

The NATIONAL WOOL GROWER



Proceedings on
Marketing Charges



A New
Public Domain Bill



The Economic Status
of the Sheep Industry
in the United States



The Durability and
Scourability of Sheep
Branding Paints

Official Organ of the
NATIONAL WOOL GROWERS
ASSOCIATION
Salt Lake City, Utah

Official Organ of the
NATIONAL WOOL MARKETING
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Boston, Mass.

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The NATIONAL WOOL GROWER

Official Organ of the
NATIONAL WOOL GROWERS ASSOCIATION
and the
NATIONAL WOOL MARKETING CORPORATION

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SAID THE BROOK TO THE PUMP...



"When your customers don't want water, you don't pump any. But I have to go on all the time. The springs and the rains keep sending water to me and I can neither refuse it nor store it. So I have to keep it moving, whether my customers want it or not."

A FABLE, of course. Yet it illustrates the difference between most manufacturing industries and the meat packing industry.

When the demand for steel diminishes, the mills reduce their output. The raw material remains in the ground or "in stock" and the supply doesn't dwindle or deteriorate. It is immediately available when wanted.

But the meat industry, like the brook, has to keep going. Cattle and hogs and sheep keep right on eating and maturing regardless of the demand for meat. Supplies cannot be stored up, either in live form or as dressed meat, and consequently they must be sold for consumption at approximately the same rate they come to market. And this

can be done only through the medium of elastic prices and efficient distribution.

Prices must always be kept low enough to permit of complete consumption, while distribution must be sufficiently widespread to reach the markets where the best prices are obtainable.

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President

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Editorial Comment on Sheep and Wool Affairs

Feed conditions and prospects in the range states generally appear to be considerably better than usual at this time of year. The supply and demand figures also are favorable to the growers of wool and lambs.

Favorable Factors

While government estimates showed some increase in the sheep population as of January 1, it is now apparent that the unusual winter losses have more than offset the increased number of stock sheep supposed to be on hand at the beginning of the year. A smaller percentage yield of lambs will, if feed conditions continue as they promise, result in better weights and conditions at the market and give further help to the growers' side in the price making.

With a demand for lamb that has never before been equalled in the United States, it also seems practically certain that the 1933 crop will be still smaller than that of this year.

In its economic and financial phases, however, the sheep industry is still far from satisfactory. Even so, it should not be considered as being any worse than

Reconstruction Progress

any other branch of production or industry. The serious ills are not due to conditions within our own industry, but to national and international affairs. It has been recognized for a long time that what was thought to be a minor readjustment in the fall of 1929 was really the beginning of a world-wide economic revolution.

Just how that revolution is to be completed and what are to be its final effects, it is still impossible to foresee. As often happens, a large part of the change had really taken place before even the astute recognized that anything unusual was in the making.

The prompt and courageous actions of the United States Congress in meeting the situation have so far been rather disappointing in results. This, however, is in part due to the unfavorable national psychology attributable to the less pleasing record of the Congress in meeting the tax and budget questions. It seems certain that these will have been disposed of satisfactorily during the present month.

The progress of the business reconstruction adds force to the conviction that some action is necessary in connection with our national monetary basis. Unfortunately the proposal of a large

Paying Old Debts

issue of fiat money for bonus payments is causing such alarm as to obscure or prevent the consideration that should be given to a means of making possible the payments of former debts. Of course debt payments are not in the

picture until market prices have reached a point above production costs. So far as supply and demand go to make market prices, the time for that has arrived but no commodity seems able to go forward. Lack of confidence seems to prevail. After so much distress business men and bankers are inclined to hold back even after the road has been cleared.

Financiers and practical economists are giving increased consideration to the possibilities of increasing the price of gold and thereby of commodities as a means of permitting the payment of debts incurred under the high price level. They consider that such a course would increase commodity prices toward the figures that prevailed when the debts were incurred. While such action would be very gratifying to the debtors, it might bring further problems in connection with increased costs and continued uncertainty as to margins between outlay for production and sales returns.

The solution of the sheepman's problems will undoubtedly come as a part of the general economic and financial recovery. While the time or method of the completion of that recovery cannot yet be clearly recognized, it is certain that most of the ground has been prepared for its accomplishment. As was said by the late Dwight Morrow when asked as to the time of the termination of the debacle of 1920, "improvement will begin at least sixty days before anyone knows it."

Dr. Burmeister's discussion in this issue relates to the status rather than to the future of the sheep business. Unfortunately his time on the convention program was cut short and his answers to the questions raised in the last part of his paper were not obtained.

Sheep Industry Changes

Every period of American depression and recovery has effected a shift in the center of production and changes in the type of sheep kept in important sheep raising states. It seems unlikely that any part of the country will now go more strongly toward fine wool or toward fat lambs sired by rams of mutton breeds. Texas accounted for 31 per cent of the sheep increase in the last nine years. If that state now goes into cross breeding, the wave of fine wool demand will find a short supply in the domestic market.

One result of the present situation is sure to be the holding down of expenses. This, however, will not be restricted to any one state or section. And a likely result is the increase of lamb production in the corn belt and other farming states. This is the first period of decline in which the farm states have not gone short of ewes. Wool and lambs have held their prices better

than have corn and hogs. Too, farmers have found that diversification with sheep avoids some of the labor problem that goes with dairying. If lamb production shall now develop in the farm states, it would not be seriously unfavorable to the range operators. The most profitable farm lambs are those that are ready for market for May. If a larger native crop is produced, it could and should go to market during what now is the last part of the fed lamb season and before heavy shipments of the early crop of western states. This would equalize distribution to the advantage of all sections.

Perhaps it would cause a shortening of the lamb feeding period, but there is certainty of lessened range production for some years, which means fewer lambs to be finished.

Then, there is assurance in the fact of the larger consumption of lamb. Thousands of new customers have come to like lamb and to know that it fits into their budgets and menus. With even larger numbers, lambs, if of good quality and properly distributed, will be wanted at prices that are at least in a fair relation to other food prices.

Proceedings on Marketing Charges

Commission Charges

LAST month failed to bring the expected decision of the Secretary of Agriculture in the cases of commission rates at the Kansas City and St. Joseph markets. Hearings in connection with the Kansas City commission business had been concluded late in 1930. Representatives of the commission salesmen at that market have been in conference with the Department of Agriculture officials in recent weeks, and it is understood that some material reductions may be effected.

Hearings in the St. Joseph case were held last June, but as yet there has been no inkling of the character of the decision to be rendered, or as to when it will be forthcoming.

In general, it appears to be the policy of the commission men to adhere as long as possible to the present high rates which are causing such general and strong complaint on the part of their shipper customers. It must be admitted that from a purely selfish viewpoint, such is a wise policy for the commission men, as government action is extremely slow, and so far as can now be judged, the results are neither seriously injurious to the commission men nor helpful to those who pay the charges.

An audit was made of the books of commission firms at the St. Louis market last year. The official hearing with which such cases usually are opened in a formal way has been

again postponed, and it is announced that there will be a informal conference between the commission men and the representatives of the Secretary of Agriculture on May 12. If agreement is reached by this method, as was done in the case of the St. Paul market, such new rates as are to be observed should become operative without delay.

Arrangements are also being made for another informal conference with commission salesmen at the Chicago market, which is likely to take place during next month. The Department of Agriculture has not yet announced whether representatives of shippers are to be admitted to these conferences which are supposed to be less formal and of shorter duration than the customary hearings which take place when the procedure follows the regular legal order.

Freight Rates

TWO hearings, at Kansas City and Dallas, have been held in the reopened case of general livestock rates in the district west of Chicago. This case which has been known as I. C. C. 17,000 (9) since it was opened in June, 1927, was decided on June 8, 1931. The new rates which were prescribed in the official decision effected savings of from ten to as much as fifty-five dollars per car from points in the range territory to Chicago and the river

markets. In a few cases, the mileage scale beyond which the Commission said the carriers could not go gave authority to some railroads to raise previous rates, but such action was not required. The new scale of rates has been operative since January 25 of this year.

At the Kansas City hearing, which was attended by the Secretary of the National Wool Growers Association, it was announced that the sole purpose of the continued hearing was to obtain a public record of the changes that had taken place in the livestock and transportation industries since May 19, 1928, the date at which the last testimony was taken in the original proceedings.

Hearings open at Los Angeles on May 9, and are to continue at Portland on May 17, Salt Lake on May 23, and at Chicago on June 6. The National Wool Growers Association is cooperating actively with the various state associations to secure competent witnesses and official statistics to produce a full record on the lines called for by the Interstate Commerce Commission. While the Commission is apparently unwilling to reopen any of the controversial points before decided, yet it is uncertain what material or questions may be introduced by the railroads in connection with the call for testimony as to changes in conditions. It is probable that the full plan of the railroads in connection with this case will not be disclosed until

the hearing opens at Chicago on June 6.

The Commission announced that briefs should be filed one month after the close of the hearings, and that the oral argument of the case before the Commission itself will take place not later than October, though it is possible that no such argument will be allowed. This makes it seem almost certain that the final word from the Commission as to the continuation of the rates now in effect may be forthcoming before the end of the present year.

Stockyards Companies Win in Courts

FEDERAL court decisions unfavorable to the Secretary of Agriculture and the shippers of livestock were handed down last month in the cases of the Denver and St. Joseph stockyards companies.

Secretary Hyde ordered a reduction in stockyards charges at the St. Joseph market to be effective on September 3, 1931. Charges for handling sheep were to be 7 cents instead of 8 cents and somewhat larger reductions were ordered to apply on cattle and hogs.

In the Denver case the Secretary ordered that, effective September 10, charges on sheep should be reduced from 8 cents to 6½ cents; on cattle from 35 cents to 28 cents per

head, and on hogs from 12 cents to 10 cents.

Department of Agriculture officials have ordinarily favored larger reductions for cattle and hogs than in the case of sheep because of the fact that for the latter only very rarely are purchases of feed made in the stockyards at the markets. The feed purchases for cattle and hogs furnish some profit to the yards companies and this fact has been taken to justify larger reductions in the yardage charges for these classes of stock.

The decisions affecting these two markets were rendered by the Secretary of Agriculture last July. The cases were placed on the calendar by order of the Secretary in 1929. The public hearing for the St. Joseph yards was opened on December 2, 1929 and that at Denver some months later. Before the effective date of the Secretary's order, the companies controlling both these stockyards secured from the federal courts an injunction restraining the Secretary from enforcing the order. The same court required that the yards companies should set aside the monies representing the difference between the old rates and those proposed by the government and that such money should be held available for distribution in accordance with the final outcome of the cases.

The three-judge federal court dealing with the Denver case, considered it solely on the basis of the record made by the Department of Agriculture, together with the arguments of the attorneys for the government and for the stockyards, and rendered its decision on April 2. The findings of the three judges were unanimous only on one or two of the major points covered in the decision. Judge Symes dissented from the position taken by Judges McDermott and Kennedy. As it stands the decision fully supports the authority of the Secretary of Agriculture under the Packers and Stockyards Act of 1921, to prescribe just and reasonable rates of charge for stockyards services and to value the yards properties in connection

with the administration of a fair rate of charge for services. The court said that it made no objection to the Secretary's rule of allowing earnings of 7½ per cent per year on the amount invested.

The Secretary's action, however, was reversed in respect to a number of points in making the valuation of the yards properties. Considerable area of land owned by the Denver yards company and held for use when expansion of the yards shall become necessary, was excluded from the appraisal of property upon which the earnings of 7½ per cent should be allowed. The government officials had also excluded from the appraisal the area used for railroad tracks on which stock is delivered. It was shown that the yards company obtained a revenue from the railroads for the use of this property. However, the court held the opinion that the government had made an error on this point and that the appraisal should be revised accordingly. Judge Symes dissented on this point.

In ordering reductions of yardage charges at Denver, the Secretary of Agriculture indicated that the prescribed rates might not be sufficient to enable the company to make adequate earnings, but that further revenue might and probably should be obtained through collection of charges from traders operating in the yards. The court held that it was not permissible for the Secretary to make suggestions to the yards companies as to the management of their business or the sources of income.

The unfavorable decision in the St. Joseph yards case was also rendered by a court of three federal judges. In this case the chief point made by the complainants was on the grounds of the unfairness of requiring a scale of charges calculated to produce revenue on valuations and operation costs as of 1928. The initial hearing of December, 1929, was preceded by government audit of the yards company's books and appraisals of their property as of 1928. In the appeal it was argued

SHEEPMEN'S CALENDAR

SHOWS AND SALES

National Ram Sale, Salt Lake City—
August 29, 30, 31.

California Ram Sale, Sacramento—
May 31 to June 1.

The International Live Stock Exposition, Chicago—November 26-
December 3.

CONVENTIONS

California Wool Growers, San Francisco—November 17-18.

American National Livestock Assn.,
Ogden—January 12-14, 1933.

by the attorneys that the business of the yards had declined materially between 1928 and 1931, and that the rate proposed on the basis of 1928 figures would not return the necessary income. The court concurred in this view and also criticized the Secretary's decision on some minor points in connection with the basis of valuation.

These two decisions do not endanger the authority of the Secretary of Agriculture to act as he has been doing in such cases. They do, however, mean further delay in spite of the fact that a period of three years was required for the full proceedings by the department in reaching a decision. When further legal aspects of such matters have been cleared up, it may perhaps develop that reasonable charges will be prescribed by the government officials for application over a considerable period of years.

With the conditions of recent years, however, it is apparent that the governmental machinery set up by the law of 1921 is wholly inadequate for the task of keeping charges in accordance with conditions or even of making prompt corrections in flagrant cases of overcharge.

The National Wool Growers Association and other producers' organizations have frequently insisted that property valuations taken in any one year, together with reports of earnings and profits as shown by one year's records at any particular yard, are unsafe bases for determining charges to be paid by shippers over a considerable subsequent period. It is quite possible, however, that the United States Supreme Court to which these cases will now be referred, may reverse the courts issuing the injunction and sustain the government's position. Even should such be done, eventually there still remains the question of the proper time or period to be employed in arriving at a determination of what are fair charges. In urging upon the Secretary of Agriculture that an appeal be taken from these decisions, the National

Wool Growers Association and the American National Livestock Association requested that the appraisals of the yards companies be submitted to the Supreme Court on the basis of 1931 values and that the lower operating costs of the later year be

also presented for consideration at that time.

Secretary Hyde has not yet announced his decision in the Kansas City stockyards case which has been under consideration since January, 1930.

Packers' Consent Decree Sustained

THERE will be no let-down in the present restrictions affecting packers who wish to enter into the retail meat trade or into the wholesaling of other food products.

The five large packers were debarred from such activities by the Palmer Consent Decree issued in February, 1920, through the Supreme Court of the District of Columbia. That decree became effective by agreement between the packers concerned and the government officials following a long and distressing period of investigation of packer affairs and of charges to the effect that they were acting in the restraint of trade. At the same time the packers were debarred from having interests in stockyards property or livestock market newspapers.

About three years ago the same packers concerned in the decree of 1920 made application to the court by which that decree was issued for a modification of its terms. It was claimed and argued that conditions had materially altered and that there could not now be any danger to the public or other food interests if the packers were allowed to enter the wholesale or retail trades. Their petition to the court also referred to their ownership of stock in stockyards at public markets. This petition was widely supported by livestock and other organizations.

The testimony was taken at Washington in the fall of 1930. Some months afterward Justice Bailey of the Supreme Court of the District of Columbia rendered a decision which would have had the effect of permitting the packers to ship and deal in groceries and general food products but would ex-

clude them from retail meat activities. The decision suggested no change in the restrictions on stockyards ownership.

The United States Attorney General took an appeal from this decision, insisting that the full terms of the original decree should continue to be effective. The American Wholesale Grocers Association and the National Wholesale Grocers Association supported the government's position while the plea of the packers was supported in briefs filed for the National Wool Growers Association, the American National Livestock Association, and the National Swine Growers Association. This case was submitted in the October term of the United States Supreme Court and the decision was announced on May 2. This decision, which is altogether final, is wholly unfavorable to the packers and continues the original decree as asked for by the government lawyers and the wholesale grocers. The decision was the first to be handed down through Justice Cardozo, whose appointment to the Supreme Court from New York was recently confirmed by the Senate. Justice Butler dissented and was joined by Justice Van Devanter. Justices Hughes, Sutherland, and Stone did not sit in the case as they had become ineligible through former connections as representatives either of the government or the packers.

Through the arguments in connection with this proceeding, the packers had much to say regarding the possibilities of offsetting some of their large overhead expenses by engaging in business in related lines.

Since they are not to be able to change their present scope or methods of business, they will apparently be forced to resort to other methods for lowering their overhead costs. The situation gives fresh interest to the idea and claim that important packers and other extremely large and powerful corporations may have passed the point and size of most economical operation. Smaller and independent packing companies in the Middle West are reported recently to have been giv-

ing great concern to the big packers, particularly in the purchase of hogs and the sale of fresh and cured pork products.

The effect of the decision also adds interest to the remarks of President Hagenbarth at the last convention, which referred to the necessity for the slaughtering of lambs in places nearer to the points of production and their distribution to the consuming trade through grower-controlled agencies. It is hardly to be expected that the pres-

ent large packers will or can open new plants for slaughter and distribution at points removed from the present large public markets where they have such heavy investments and where much of their extensive overhead is incurred. It may be, however, that with further development in the competition between large and small corporations, independent concerns operating near points of production will gain a foothold and become a larger factor in the meat trade.

The Records of Our Representatives at Washington

TODAY the attention of business men and of Americans generally is fixed upon Congress. Other nations also are closely watching our national legislative body, particularly to see what legislative acts may be taken to improve, ameliorate, or reorganize our economic and financial structure.

It is doubtless true that the people ordinarily are too much concerned over what Congress will do or will fail to do. Legislation has occupied a large place in our ideas and we are prone to feel that the future is wholly dependent upon the success of our ideas of laws "that ought to be" to make some other interests do this or that, or to fear that the country will immediately go to the dogs if some seemingly radical idea is placed on the statute books. But today conditions are very unusual and critical. Emergency measures must be employed to carry business through the storm and maintain our country's financial standing until things settle down into the new order. There has been need for the doing of many unusual things that could not be done without changes in our laws that restrict actions of our officials in a way that is wholly right and necessary most of the time.

Fortunately Congress already has provided authority and means for

most of the needed extraordinary actions of the government. Confused as is the present outlook, it is



SENATOR STEIWER OF OREGON

certain that the national budget and the tax program will be wisely adjusted within a few weeks. Then we can get our minds back upon state, county, and town affairs and upon our private concerns.

When this world economic revolution has made further progress

it will be possible more intelligently to gage the new standards, relationships and requirements. It is certain that legislation will still be important. Many of the recent emergency measures will need to be repealed. New problems will confront us and the best minds of the country will be needed in our national and state legislative chambers to deal with them. So that instead of there being any reason or excuse for indifference in the study of party policies and political candidates, the citizens must be more than ever alert and attentive in the use of the ballot.

It is because of the unusual situation and prospects, and because of the considerable weakening of party lines and affiliations that the National Wool Growers Association relaxes its policy of complete silence on everything of a political nature and accedes to a request for a statement upon the record of a member of Congress. Members of the Oregon Wool Growers Association have called for information as to the actions and position of United States Senator Frederick Steiwer from that state, upon matters affecting agriculture and the livestock industry.

This is an easier and more pleasant assignment than it might be if the request concerned some other Senators who were less approachable and considerate, especially in connection with tariff matters.

Senator Steiwer, who is now 49 years of age, has been in the Senate since March 4, 1927. The officers

of the National Wool Growers Association who have had occasion to present matters to members of the Congress have, from the beginning of his term, found Senator Steiwer unusually well informed on all questions related to agriculture, livestock, or to general or agricultural finance. The same is true in respect to matters pending before the executive departments.

His committee assignments in the Senate include appropriations, claims, judiciary, Indian affairs, and expenditure in executive departments.

He is a staunch and consistent protectionist. On every vote taken in connection with the duties on wool and shoddy, he was present and recorded in favor of the interests of the wool grower. Not only this, but he was aggressive both on and off the floor of the Senate in convincing his associates of the need and justice of what the wool growers asked for. One of the notable features of the debate upon the wool paragraphs in December, 1929, was his exposure of the inconsistency of some New England Senators who were strongly opposed to the present rates of duty upon shoddy and other wool wastes that formerly were allowed to be imported under such low rates as to permit their large substitution for virgin wool. Some of Senator Steiwer's remarks upon another occasion concerning western sheep affairs were reprinted in the *National Wool Grower* for January, 1930, (pages 13-14).

In addition to handling an active law practice in the principal livestock section of Oregon, Senator Steiwer was a considerable owner of sheep. His speech upon the occasion referred to showed a thorough study and clear understanding of wool trade and mill practices and of the history of earlier tariff laws.

From the standpoint of his own interest, he probably has had too little regard for the limelight and for getting his name in the headlines of the newspapers. Rather his record has been characterized by a prodigious capacity for hard study

and sound constructive thinking. While neither securing nor pushing for enactment of bills of his own authorship, he has served notably in analyzing and perfecting numerous other bills that have brought publicity to those whose names they bore. It is well known in the Senate that he often has a better understanding of the provisions and objects of a bill than is possessed by its apparent author. He has rendered special service in liberalizing the operation of the Federal Intermediate Credit Banks through special committees upon which he served while fully attending to his duties on standing committees.

Regarded by all who know him as a regular party man, he does his own thinking and has in some cases voted in opposition to the wishes of one of his strongest admirers, President Hoover. Senator Steiwer is a fine and unusually capable public servant.

F. R. M.

The Tariff and Present Wool Prices

IN recent weeks there has been some misunderstanding and a good deal of loose talk about the relationship of the protective tariff to American wool market prices.

Growers have always understood that it is not reasonable to expect Boston quotations always to reflect the full amount of 34 cents per clean pound, which is the rate in effect on the bulk of imported wools under the Hawley-Smoot law. This is partly due to the fact that Australian wools have a higher mill value than corresponding domestic wool because of the sorting and preparation carried on in the shearing sheds of that country.

Wools used for carpets are still admitted duty-free because of their being of a class not directly competitive with anything grown in this country. The regulations governing the restriction of the use of all such imports to carpet purposes

were strengthened in the law of 1930 and appear to be proving effective.

The tariff rate of 34 cents per pound of clothing wool means 11 cents per pound of grease wool shrinking 66 2/3 per cent. On wools of lighter shrinking clips the rate amounts to more than that when computed on the grease basis. The amount of this benefit that has been reflected in Boston quotations has varied within the usual limits and has been mainly effective until recent weeks.

The National Wool Marketing Corporation is properly entitled to a great deal of credit for having maintained Boston prices and quotations at a level that includes the most of the benefit of the tariff. Opinion differs as to the wisdom of the Corporation in following this policy. Some growers and students of marketing have expressed the opinion that it would have been better for the Corporation to have forced sales in volume last year and allowed the prices to take care of themselves. Of course, hindsight is always the best, but it still is not plain that the Corporation has made any mistake. It has always been understood that so far as the operation of the mills and the sales of woolen goods were concerned, nothing was to be gained by further reductions in prices on raw material. This opinion is reiterated in the April 25 issue of the *Boston Evening Transcript*.

One thing is certain, the action of the cooperative organization was sufficient to maintain Boston quotations practically on a parity with foreign markets plus the tariff until the growers took control of the market a few weeks go by making home sales at whatever prices were obtainable from the speculative trade. Extreme necessity for ready cash, even in small amounts, together with much uncertainty and discouragement, has prompted this action in many cases and the dealers have naturally and properly been quick to take advantage of the situation. The result has been that

dealers and mills now are able to obtain new wools at prices that have no relation whatever to world values or the tariff. Recent Boston quotations cite Sydney 64s-70s good combing wools as being obtained, laid down in bond in Boston, at 29 cents per clean pound. The full parity would mean 63 cents per clean pound for these wools at Boston. However, under date of April 30, Territory fine staple wool, which corresponds to the imported grade mentioned above, was quoted in that market as being obtainable at 47 cents. This means that about one-half of the benefit of the tariff has been surrendered. This is no fault of the tariff and no fault of the National Wool Marketing Corporation. It is due first to the extreme necessity of the growers who have taken control of the market, or to their lack of information or confidence in their product and in their own selling agency.

The present conditions in the wool market are no different from those obtaining in all other commodity markets in this and other countries. The serious and unusual world economic situation goes farther than tariff or any other legislative influence. With a reasonable degree of recovery toward normal conditions and relationships the effectiveness of the wool duty will again be reflected in the checks received by growers. It is a sad but true fact that, notwithstanding the conditions, it is and always has been within the power of the growers to obtain for their wools the full parity, that is, world prices plus the American tariff, less the difference of value due to preparation and partial sorting. The growers' cooperative concern at Boston is the best instrument the industry has ever had for accomplishing this very purpose. With the better understanding and larger support of this concern, and with the growers' recovering a status under which they can operate according to their judgment rather than through necessity, the full benefit of the

tariff rates which they have always defended will be secured.

That the tariff is still operating is shown by the fact that during the last week of April the imports of dutiable wools through Boston, Philadelphia, and New York amounted to less than 400,000 pounds. Larger quantities of car-

pet wools were received free of duty, but as above referred to, this class of wool cannot now come into competition with the product of American flocks. The imports of wool of all classes since January 1 of this year have been slightly more than half of the amount received in the corresponding part of last year.

A New Public Domain Bill

REPORTS from Washington make it pretty clear that there is no prospect of passage of the Evans and Nye bills which were introduced in the House of Representatives and the Senate respectively as including the recommendations of the Committee on the Conservation and Administration of the Public Domain. During the hearings and discussion at Washington, these bills have commonly been referred to as the Garfield Bill. The chairman of the committee referred to, Honorable James R. Garfield, assisted by Francis C. Wilson of New Mexico, drafted the administration bill and they were prominent before the Congressional committees in urging its passage.

It seems entirely unlikely that there will be any public land legislation during the present session of Congress. With economic conditions so extremely disturbed, and with such diversity of opinion as to what should or can be done in the matter, it may be just as well that the situation should be allowed to rest for a further period. There are, of course, cases in which the situation is acute, and it is regrettable that proper action cannot be taken to relieve such at an early date. Stockmen in most states are strongly opposed to action of any kind under present conditions. When the industry shall be returned to a basis of showing some profits, it will then be possible for those affected better to consider the opportunities offered for stabilization and legalization of the necessary use of government lands.

It is also reported from Washing-

ton that representatives of various states have urged the passage of individual bills allowing this or that change or arrangement for a particular state. The opinion of the committee seems to be unfavorable to such action.

Congressman Colton (Utah), who was chairman of the Public Lands Committee in the House of Representatives under the Republican regime, has framed a new bill calculated to meet the wishes of those states urging present action, and also to permit similar action in other states when desired. This bill is somewhat similar to the earlier Colton Bill known as H. R. 4541 which was printed on page 10 of the January issue of the National Wool Grower.

It is understood that Mr. Colton's new bill has the approval of both the Department of the Interior, and of the Forest Service of the Department of Agriculture. The principal provisions of the bill and their apparent intent and effect are summarized below. The measure which was introduced on May 3 bears the number H. R. 11816. It is now before the House Committee on Public Lands, though as stated above, there is small prospect of its coming to a vote during the present session. Mr. Colton is of the opinion, however, that there is now more feeling in Congress for some sort of grazing legislation than has existed for a long time.

Provisions of H. R. 11816

1. Grazing districts may be established by the Secretary of the Interior "from any part of the nontimbered public lands not in National Forests, National Parks and

Monuments, or Indian reservations, and which, in the opinion of the Secretary, are chiefly valuable for grazing and raising forage crops."

2. The Secretary of the Interior is authorized to issue permits for the grazing of livestock on such grazing districts under rules and regulations prescribed by him, and upon the payment annually of reasonable fees prescribed under his authority. Such permits may be issued to individuals, groups, or associations, for a period of not more than ten years.

This provision for issuing of permits to associations is calculated to meet a valid objection frequently raised on the point of the impracticability of assigning any particular allotment or area for the use of a permittee entering what is now the unregulated public domain. Feed, water and snow conditions are so extremely variable that established users of winter range areas commonly are compelled to hold their flocks and herds from twenty to as much as one hundred miles away from the areas used in other years. This situation would be met by the taking out of permits for associations composed of those using a section of country which might include several counties or as much as was necessary to provide feed for the combined stock ownership of the association members under the variety of seasonal conditions. The bill places no limit upon the size of a grazing district, which apparently would be left to the discretion of the officials of the Department of the Interior and the desires of the stockmen affected by the proposal to establish any particular district.

3. Use of the grazing lands within an established district without a permit, or other violations of the proposed law, or of regulations issued thereunder, would be punishable by a fine of \$500 or imprisonment for one year.

4. Holders of grazing permits may provide water, fencing, or other improvements and must be compensated for such in case of their use by other or succeeding permittees.

5. Homesteading or patenting of lands in such established districts would be permissible only for areas of 160 acres which would remain within the grazing district until patented. The Secretary would be authorized to examine and classify any lands within such grazing districts which are valuable and suitable for the production of crops other than native grasses and forage plants, and to open only such lands to homestead entry.

The effect of this provision would plainly be to suspend the 640-acre homestead act with any grazing district that might be established.

6. The administration of established grazing districts would be under the immediate direction of the 35 local offices of the General Land Office now operating in the 12 states in which the public domain is chiefly located.

7. The President of the United States, on the recommendation of the Secretary of the Interior, could add any public lands to the national forests, and on recommendation of the Secretary of Agriculture, could transfer grazing lands now within national forest boundaries to grazing districts that might be established.

8. The Secretary of the Interior and his subordinates would be expected to cooperate with local associations of stockmen interested in the use of the grazing districts, and with such advisory boards as they may need. It would be expected that the views of authorized advisory boards would be given fullest consideration "consistent with the proper use of the resource and the rights and needs of minorities."

Legislation cannot, of course, compel cooperation. The extent to which stockmen might have a voice in the administration of grazing districts, or in the framing and enforcement of the federal rules and regulations, would necessarily be entirely dependent upon the attitude and personnel of the officials of the Department of the Interior. As in the present case of forest grazing administration, such cooperation might be accorded in some cases, and of no account in others. It would depend upon the attitude and actions of the officials of the stock-raising associations as well as upon the leanings of the government representatives.

9. Of the fees which the Secretary of the Interior might require to be paid, 10 per cent would be used for the construction, purchase, or maintenance of range improvements. Twenty-five per cent would go to the states for road and school purposes, and the balance into the federal treasury. In respect to the amount of grazing fees, the stockmen would be in the same position as they now are with the Forest Service. All would depend upon the attitude of future Secretaries of the Interior and the permanent employees of the bureaus in the Department of the Interior.

10. There would be no change in the present situation and customs in respect to prospecting, developing, and patenting mineral claims.

11. The Secretary of the Interior could give public lands outside of grazing districts in exchange for patented lands within a proposed district, such exchange to be on the basis of equal values. Proposal for such exchange would be required to be advertised for at least four weeks in the counties in which affected lands are situated.

In Memoriam



E. M. OTERO

MR. EDUARDO M. OTERO, one of the most prominent sheep owners in New Mexico, died suddenly at his ranch at Magdalena on April 9. Death was due to an acute attack of indigestion.

In political affairs as well as those connected with the sheep industry, Mr. Otero was a man of power. His ranch and sheep holdings were said to be the largest in the state; in fact, few individuals in the country as a whole control a greater acreage of land than did Mr. Otero. While his residence was maintained at Los Lunas, in Valencia County where he was born and where his political strength won for him the title of "King of Valencia County," his ranch holdings in Socorro and Catron counties were also extensive.

Mr. Otero was very actively interested in sheepmen's organizations, served as president of the state wool growers' association in 1918 and 1919, and at the time of his death was vice president of the New Mexico Wool Marketing Association.

Mrs. Otero and a step-son survive.

THE Monarch Bulletin, which is published by the Malleable Iron Range Company of Beaver Dam, Wisconsin, devotes the entire space of its March issue of this year to the topic "Lamb Available All Year 'Round." Miss Inez S. Willson, home economics specialist for the National Live Stock and Meat Board, and Miss Ruth J. Cooper of Tracy-Locke-Dawson were responsible for material incorporated in the attractively arranged pages of the bulletin. In addition to the general discussion of the merits of lamb, some out-of-the-ordinary ways to use it are given with colored illustrations.

Around the Range Country

Wyoming

Warm weather, much of the time unusually dry also, was rather favorable on livestock and a gradual spring improvement was made, though cattle and sheep still average in only fair shape. A general storm late in the month left moisture enough for giving the grass a good start, and for supplying the watering places. Nearly everything has been driven to pastures or ranges, very few animals being left on feed.

Casper

No bad storms occurred during April. There is plenty of moisture now (April 25) although it has been dry. Feed has a better start than usual.

Owing to the hard winter and the fact that many old ewes were kept over last fall, a 5 per cent loss will be figured up for the winter season. Except for this loss, the ewe bands are about the same size as in 1931, and there have been good lambings this year.

If the wool market doesn't improve, there will be a good deal consigned to the Co-op, but I do not know that there is a majority in favor of either the Corporation or of sending it to the independent dealers. It is too early for us to know what we can do.

Grazing leases are a little lower, not greatly reduced, however.

The public domain has been overstocked and most people here want a change in the way it is handled. They want it leased as school land is, by the state.

Montana

Sheep and cattle came through the winter with rather small losses, in fair to poor condition. Feeding was necessary through much of the month. Some grass appeared by the middle of the month, but cold temperatures and drying winds retarded the growth appreciably.

THE notes on weather conditions, appearing under the names of the various states are furnished by J. Cecil Alter of the U. S. Weather Bureau and based upon reports and publications of that bureau for the month of April.

The Wool Grower welcomes and desires communications from interested readers in any part of the country for this department of the Wool Grower and also invites comment and opinions upon questions relating to the sheep industry and of importance and significance to wool growers.

Moisture in the soil, however, seems to be abundant from the numerous rains and snows, so that grasses are expected to make a good showing when warm weather arrives. By the end of the month very little feeding was necessary.

Sun River

We have had some moisture during April but the weather is cold and the growth of forage very backward. There have been some very heavy losses in range bands reported in this vicinity, in a few cases as high as 35 per cent.

There was much more than the usual March lambing and as the early part of March was extremely cold, the loss in lambs was heavy. Many outfits report saving only from 30 to 50 per cent of the drop.

April lambing reports also show a big reduction from last year. If the lambing in this vicinity is any criterion of the range states in general, there will be no flood of lambs to the markets next fall.

The lease price of range in this vicinity has not been reduced to any extent. I think this is largely due to the fact that the tax is so high on range land. In very few cases

can an owner lease land for enough to pay the taxes on it.

E. R. McClure.

Deer Lodge

Feed is about ten days earlier than usual. The last half of April has been cold and windy and the grass has been retarded; needing rain now (April 29). There is good early grass on the spring range, but the ground is dry from two years' drouth and lots of rain is needed to make the springs flow.

The winter took a toll of about 2 per cent in the ewe bands in this section, but about the same number of ewes are to be lambd as in 1931. Lambing generally doesn't commence until May.

The rate for machine shearing is 8 cents and board.

We paid lambers \$40 and are paying herders \$40.

Last year we shipped shorn buck lamb wool to Boston and it sold for 19 cents. Shipped some similar wool in April of this year and estimate it will sell for 14 or 15 cents, as the wool market in Boston is off about 25 per cent from this time last year.

There have been some reductions in charges made for privately owned lands, but none on state holdings.

We do not think the grazing on the public domain has deteriorated only as caused by drouth. Growers here favor state management of these lands.

We have been able to get all expenses down but taxes. They will amount to over \$1 a head on our bred ewes this year.

Deer Lodge Farms Co.

Wilsall

We have had a very fine April, with warm weather and plenty of feed. Grass is earlier than last year and it appears now that the drouth is broken and that we are going to have plenty of moisture and fine grass.

One or two outfits reduced their number of ewes, but others increased theirs, so there are about as many as a year ago. The loss in ewes during the winter was around 2 per cent.

April lambing was good, with a greater number of lambs saved than in 1931.

We have heard nothing so far about what the attitude will be towards the Cooperative. No sales have been reported.

Understand the price of machine shearing will be 8 cents and board.

There are no government lands, outside of the forests, here.

F. W. McReynolds.

Cascade

April weather has been good and the spring range is excellent (April 22).

It is hard to say what the death loss in ewes was this past winter, but expect it was more than normal. A great many sheep were wintered on scant feed and the loss among the smaller outfits will be much more than normal. Also a good many old rams were used last fall, which will cut the lamb crop down.

We haven't over 70 per cent of the number of ewes we had last year to lamb this spring. We are not through lambing yet, but so far the number of lambs saved is about the same per hundred ewes as it was in 1931.

No offers have been made for wool. The bankers seem to want the growers to sell their wool, if possible. There will be no shearing for another month. We do not expect to pay over 8 cents and board.

So far as I know there have been no reductions in leases for grazing lands. We have no public domain here.

C. R. Tintinger.

Idaho

The spring has been more or less retarded by cold weather, but there has been a little new feed and livestock have made fair improvement in some sections, without excessive supplemental feeding. Moisture has been ample in nearly all range ter-

ritory so that grasses should thrive when warm weather comes to stay. In the southeastern portion livestock are now being turned out onto the range, though not in very good condition, nor with very much feed in sight.

Dubois

We are having a good rain (April 27) and while the grass on the spring range is coming slowly, a few warm days would mean plenty of good feed.

Lambing starts about the first of May. The winter loss in ewes was around 5 per cent, and there are fewer ewes to lamb than in 1931.

No shearing here until June; the growers, however, are quite friendly to the Cooperative.

In recent years there has been less feed on the government lands outside of the national forests, but only on account of dry seasons. A good many people here would like to lease this land as it is.

James Denning.

Hagerman

Feed fair and water very scarce on the desert (April 20), and rain badly needed. Grass is fair on the range, but water is short.

Our winter losses have been heavier this year due to the curtailing on hay and grain. We did not have so many ewes to lamb (10 per cent fewer) this year and our yields will be about 10 per cent short of those of a year ago.

All the men I have heard express themselves on what they are going to do with their 1932 wool have indicated that they will consign to the independent wool dealers.

We are paying 10 cents and board for machine shearing, the shearers furnishing the plant.

Grazing on the public domain is very decidedly inferior to what it was several years ago, but opinion on what should be done to correct this deterioration varies from complete control to no control at all.

Chas. W. Abbott.

Washington

Livestock have held up in fairly good condition, though pasturage has been rather slow, and not very good in any part of the state. Sheep shearing progressed satisfactorily, in spite of several rainy days, some of them being rather cool. Warm weather is needed to force the growth of grass and forage generally.

Hooper

We have had cold weather during April, but feed is good, and the spring range is very promising. Our losses this winter were about normal, but the lambing percentage is under that of 1931 by about 5 points.

Whether or not the growers will ship their wool again to the National Corporation will depend on the size of the advance it grants.

Rates for grazing leases on state lands have been slightly lowered, but not on private lands. There is no public domain left in this neighborhood.

McGregor Land & Livestock Company.

Hoover

Contrasting May with the same month last year so far it is a very cool month. Feed conditions are good and as there has been an unusually heavy snowfall in the mountains we are assured of good feed there.

Many bands are already on the trail to the summer ranges and another three weeks will find nearly all the balance either trailed or shipped. I believe more sheep are being trailed this spring than for several years past. Two things are largely responsible for this: first, the scarcity of available funds for shipping, and second, feed conditions are better than usual.

Ewes that were wintered well made the usual good lambing while those that were roughed through made, as a rule, a poor lambing. Many of the old ewes died.

Grazing leases have been reduced 50 per cent on state land. In many

instances private holdings have also had to accept a reduction.

In the lower part of the Yakima Valley the hay has been about all cleaned up. A good crop of hay will be harvested this season.

Wages have been cut about 40 per cent compared to 1929. The commodities that our men buy for themselves and families are about 40 per cent lower than in 1929. The men who have stayed on the job steady have not suffered from the reduction in wages.

J. R. Ayers.

Oregon

The spring has been backward, and ranges somewhat retarded. There has been enough moisture in places, while in other sections more rain would help; and in nearly all parts of the state warmth has been needed for the best range growth. Livestock continue thin, as a result of which many lambs that were dropped did not survive. However, a little improvement was noted at the close of the month.

Fossil

We had a very severe winter here. Most of the stockmen ran out of feed and had to buy on the outside and have it shipped in for the last thirty or forty days of feeding. It cost them \$15 or \$20 a ton by the time they got it out to their ranches, and this on top of the depression in livestock values and low prices for wool and lambs has put the majority of the sheepmen in bad financial circumstances.

Prospects for grass and crops are good (April 22), owing to an abundance of moisture in the ground.

Lambing is pretty well along with a fair percentage for the later lambing. February lambing was not so good.

Shearing is just starting, shearers to get 8 cents and board.

Coyotes are not bad here on account of the good work done by the government trappers.

J. C. Palmer.

California

Crops, pastures and ranges have showed the effects of the shortage of spring rains, excepting only in the more northerly counties where moisture conditions were somewhat better. Favorable yields of the first alfalfa crop were reported. Temperatures have been near or somewhat above normal most of the time, especially during the last few weeks. Livestock have had enough forage as a rule, and are in satisfactory condition.

Skaggs Springs

Heavy winds have dried the ground, so rain must come soon or feed will dry several weeks before normal. The range is fair (April 21), but rains this spring have been light and more are needed immediately if pastures are to be kept green the usual length of time.

The death loss in range ewes the past winter was around 5 per cent. I think the lamb crop was about 10 per cent under that of a year ago.

There is not a very healthy attitude here toward the National Wool Marketing Corporation on account of the slow settlement for 1930 and 1931 wools. While no sales of wool have been made, a good many growers feel they would rather take chances on cash sales.

Eight cents is being paid to the machine shearer; 2½ to 3½ cents to the plant men. Blade shearing is costing 8 cents per head. Board is included.

All the land is owned in this district, so we are not concerned with leases or public domain problems.

The Wool Grower is a very valuable periodical and I can't see but what it hits the bullseye in every respect.

T. J. Baxter, Jr.

Nevada

Two or three weeks of mild weather were followed by a week at the close of the month of unusually cold, stormy weather, with considerable precipitation, in the form of rain and snow. This cold snap checked the growth of range

grasses but supplied ample moisture to give grass a fine start when temperatures rise. Many weak animals have died on the range, awaiting spring feed; and others died on the way to spring and summer ranges and to shearing pens.

Utah

Much cold, rainy weather has been hard on early lambs and shorn sheep, numerous losses being reported where shearing was begun on range flocks; this included some goat losses in southern sections. Range grasses and other forage was retarded by low temperatures, and new feed is still quite scarce, the result being numerous losses of weak animals, which were short of hay or other supplemental feeds. In the last few days, however, a steady improvement was noted.

Colorado

Drouthy conditions prevailed early in the month more especially over the eastern portion, where the dry weather continued until the closing week. Nevertheless the spring is about normal in development, and ranges and livestock were making satisfactory improvement in most sections, though somewhat retarded in the west. Stormy weather with the cold weather in the west retarded sheep shearing, and was detrimental to lambing. Feed shortages are still reported in some higher western places.

Lake City

The weather (April 23) is stormy and cold; feed is short on ranches and none on the range. The very poor condition of the spring range is due to the drouth of last year.

No lambing is done here until May; we have about the same number of ewes to lamb as in 1931. The winter loss is estimated at about 2 per cent.

Nearly all of the growers who consign their wool are with the National Cooperative.

Machine shearing is being done at 10½ cents with board; blade at 8½ cents with board.

(Continued to page 31)

The Economic Status of the Sheep Industry in the United States

By C. A. BURMEISTER

Senior Agricultural Economist, Bureau of Agricultural Economics

Abstract of an Address Delivered Before the National Wool Growers' Convention, January 13, 1932

THE sheep industry, like that of most other industries, has been adversely affected by the worldwide business depression and the general decline in all commodity prices. In addition, it also is wrestling with the problem of greatly expanded sheep and wool production. Last year's lamb crop was the largest on record. World wool production is also near the record peak.

During the last two years, lamb prices have declined tremendously. In December they reached the lowest levels since 1902. Wool prices likewise are down, and one has to go back to 1913 to find similar quotations. The eight years of marked prosperity which the sheep industry enjoyed from 1922 to 1929 are now history. Entirely different conditions are at hand. These conditions will necessitate sheepmen making a number of readjustments if their industry is to get back on a profitable basis. The problem to be solved now is to determine what readjustments are necessary and how they can be made. The solution can best be reached after analyzing the factors which brought about present conditions and determining those which may cause conditions to change. It is my purpose here to bring to your attention some of the facts pertaining to your industry, since a proper understanding of these facts should be helpful to you in making plans for the future.

Prices and Buying Power

Only brief comment will be made here of the business depression which is now being felt by every country in the world. Many reasons for the depression have been ad-

vanced; equally as many methods for bringing back prosperity have been proposed. Undoubtedly, many of the reasons given and the remedies proposed are unsound. All I want to say here is that business activity in this country is now more than 40 per cent below the peak reached in 1929. Commodity prices are the lowest in twenty years. The amount of money being paid out as wages by our manufacturing concerns is now 45 per cent less than that of two years ago. There is much unemployment everywhere, and taking care of those out of work is a real problem in many cities. All of this means a reduction in buying power and a decreased demand on the part of consumers. Obviously, it is reflected back to you in the prices you receive for your products. Prices received by farmers for the products they sell are now less than half what they were in 1929.

Although there was an increase of 4,000,000 head, or 29 per cent, in the number of sheep and lambs slaughtered in 1931 over the number slaughtered in 1929, the reduction in the amount paid for the 1931 supply was about \$50,000,000, or 33 per cent. The gross income from all livestock last year was about 40 per cent smaller than the 1929 total. The decline in prices and incomes received by farmers has been offset in part by a 20 per cent decline in prices of commodities bought by farmers. In other words, although the prices of the things you buy have declined they have not as yet dropped as much as the prices of the products you have to sell. Fortunately for the livestock pro-

ducer, the prices received for livestock in most sections have not declined relatively as much as the prices of most crops, and particularly the feed crops. This may not hold true in sections where drouth cut down crop yields last year but, in general, lower feed costs have helped to reduce production costs.

Changes in Sheep Numbers

Reference has already been made to the expansion that has taken place in lamb and wool production in recent years. Sheep production like that of cattle and hogs tends to move in cycles. The sheep cycle is somewhat irregular in length although it is longer than the hog cycle which averages about four years and is shorter than the cattle cycle which heretofore has approximated 16 years.

The last low point in sheep numbers was in 1923. Numbers at the beginning of that year were estimated at about 36,700,000 head. On January 1 this year numbers were estimated at almost 54,000,000. The increase in the nine years amounts to about 17,217,000 head, or 47 per cent. Approximately 12,300,000 head, or 72 per cent of this increase took place in the thirteen western states, including Texas and South Dakota, in which the sheep produced are classified primarily as "westerns." About 4,240,000 head of the increase, or 25 per cent occurred in the Corn Belt States, including North Dakota but excluding South Dakota. The spring lamb region of Kentucky, Tennessee and the two Virginias contributed less than three per cent of the increase, or about 469,000

head. Increases and decreases in the other southern states and in the North Atlantic states about offset each other.

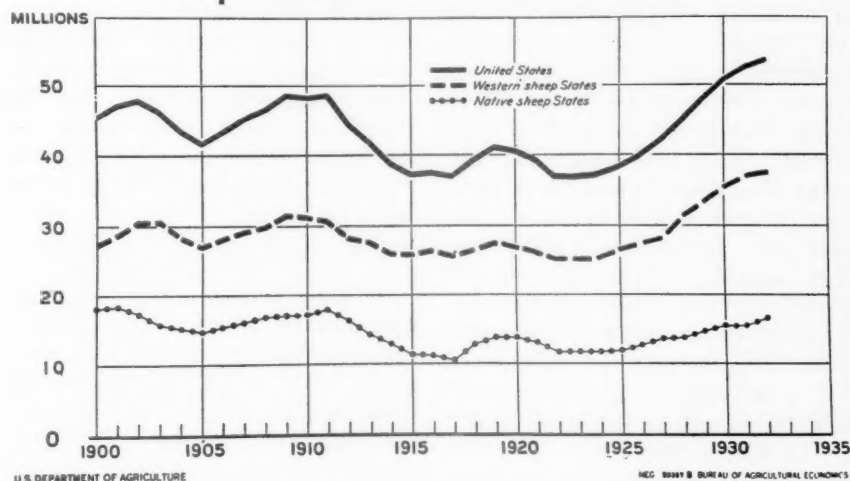
Analysis of the distribution of the 12,300,000 increase in the western group of states shows that Texas is credited with 31 per cent of it, Wyoming 13 per cent, Montana about 12 per cent and California and New Mexico slightly more than 9 per cent each. Colorado, South Dakota and Oregon each contributed about 7 per cent, whereas Utah supplied 3 per cent and Washington 2 per cent. Nevada and Arizona reduced their flocks slightly and Idaho made only a slight gain. Texas now has about 20 per cent of the sheep in the western group and California slightly more than 9 per cent. These two states, together with Montana and Wyoming, have just one-half of all the sheep in the western group and about 35 per cent of all the sheep in the entire United States.

What has been the effect of this increase in sheep numbers on the volume of sheep and lamb slaughter? The record shows that about 11,000,000 head were slaughtered under federal inspection in 1922 and that there was a gradual increase each year until about 14,000,000 were slaughtered in 1929, the last year of fairly good prices for lambs. In 1930 the number increased to 16,700,000 and last year it was more than 18,000,000. The 1931 slaughter exceeded that of 1925 by 50 per cent. In 1922, sheepmen furnished the American consumer five pounds of lamb and mutton per capita. In 1929, the amount was increased to 5.8 pounds but the consumer liked lamb so well he was willing to pay more per pound for it than he did when he was furnished with only five pounds. This was a real increase in demand—a larger quantity being taken at a higher price. Last year, the per capita supply was increased to 7.1 pounds, which was 42 per cent more than in 1922 and over 22 per cent more than in 1929. This increased supply together with

the lower purchasing power of consumers and the general decline in all commodity prices caused lamb prices to fall to the present low levels. The increased lamb production was moved into consumption but lower prices were necessary to get consumers to take it. Although

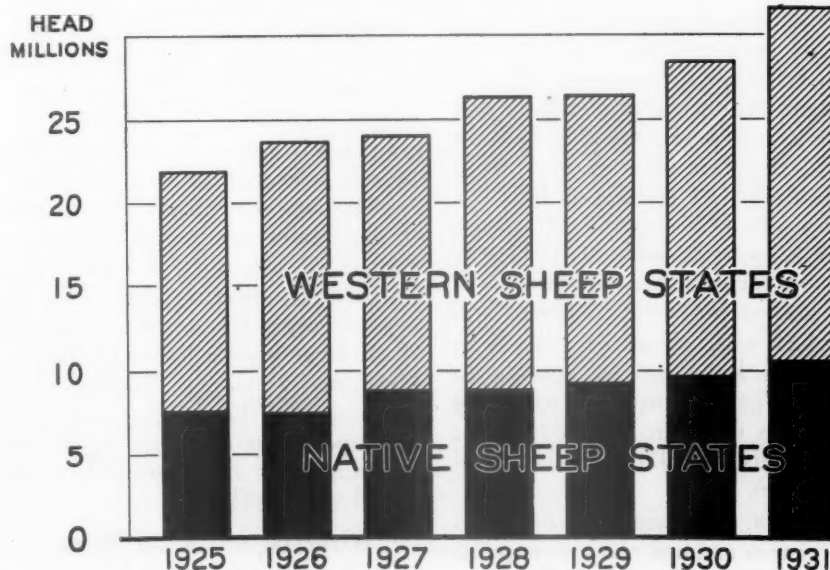
the per capita supply of 7.1 pounds last year is much larger than that of a few years ago, attention is called to the fact that back in 1911 and 1912, when sheepmen liquidated their flocks because numbers were large and prices were low, the per capita supply was about 8 pounds.

Sheep Numbers in the United States



Sheep production increased from 1905 to 1911, due largely to the relatively high prices paid for sheep, lambs and wool during most of that period. New homestead laws for the public domain and greatly reduced prices for lambs and wool caused a sharp drop in sheep numbers from 1911 to 1916. Production has increased steadily since 1923, and numbers on January 1, 1932, were the largest on record.

United States Lamb Crop



The size of the United States lamb crop has increased steadily since 1925. The total lamb crop in 1931 was estimated at 31,684,000 head whereas in 1925 it was about 22,000,000 head. The increase in the lamb crop in the western sheep states during this period amounted to about 6,604,000 head or 46 per cent, and in the native sheep states the increase amounted to 3,080,000 head, or 41 per cent.

Another way by which we might show what has been the result of increasing the per capita supply of lamb in recent years is to point out the changes that have occurred in the purchasing power of 100 pounds of live lamb. In 1922, when the per capita consumption was five pounds, 100 pounds of live lamb on the Chicago market would buy \$9.70 worth of goods in terms of 1913 dollars. In 1929, when the consumption was 5.8 pounds per person, 100 pounds of live lamb would buy goods to the value of \$10.46. Last year when the per capita consumption was 7.1 pounds, your 100 pounds of live lamb would buy only \$6.94 worth of goods. The December 1931 value of 100 pounds of live lamb at Chicago would purchase only \$5.34 worth of goods in terms of 1913 dollars and that is the same amount of goods that 100 pounds of live lamb would buy in December, 1902. It takes more than two lambs now to buy what one lamb would buy in January, 1929.

Beef and Pork Supply

Fortunately for the sheep industry, during these recent years of expanding lamb production the supply of beef for the consumer has been falling off very markedly and a slight reduction occurred in the volume of pork production. In 1926, the consumer was supplied with almost 64 pounds of beef per capita. In 1928, he was offered less than 52 pounds and in 1931 the amount was less than 50 pounds. In the case of pork the consumer was supplied with about 75 pounds in 1924 but less than 66 pounds in 1926. The amount increased to 74 pounds in 1928 but fell off to about 69 pounds in 1930 and increased slightly in 1931.

In 1928, cattle numbers on farms and ranges reached the lowest point since 1912, but have since been increasing gradually each year. This four-year increase in numbers is very likely to be reflected in increased slaughter supplies of cattle

either this year or next, thus creating greater competition for the consumer's meat dollar. Hog production likewise is on the increase as shown by an increase of about 4,500,000 head in the 1931 pig crop which began to move to market last fall. Because of a tremendous decline in our export trade in hog products we are forced to consume a larger proportion of our production in this country. The trends now underway in both cattle and hog production indicate that the supplies of meat available to the consumer in the next year or two are likely to be larger than in the last two years.

Where Lamb is Consumed

At least 50 per cent of the lamb and mutton obtained from wholesale slaughter is consumed in those states lying north of the Potomac River and east of the state of Ohio, while probably 15 per cent is consumed in the three states on the Pacific Coast. The large centers of urban population have always been our principal outlets for lamb and mutton. New York City takes about 31 per cent of the federally inspected slaughter of lambs. Boston and Chicago each 8 per cent and Philadelphia 6 per cent. Washington consumes more lamb than Baltimore although it has a much smaller population. Per capita consumption is smaller in the South but records indicate that it is increasing in that section. Almost two-thirds of the lambs consumed in New York City are shipped there alive and are slaughtered there. Partly this is in order to meet requirements of the large population of Orthodox Jews who live there. The lamb they consume must be slaughtered under the supervision of their approved representatives and it must be consumed while still fresh.

Wholesale and Retail Prices

Having noted that the consumer is taking a larger quantity of lamb and that the producer is now selling his live lambs at the lowest prices in 29 years you naturally are inter-

ested in knowing to what extent the consumer is benefiting from this great price reduction. Out of 100 pounds of live lamb the packer gets about 48 pounds of meat which he sells to the retailer and the retailer in turn, after allowing for loss in weight from evaporation and in cutting the carcass into retail cuts, gets about 46.8 pounds of meat which he sells to the consumer. We will compare then the value of 100 pounds of live lamb sold by the producer with the value of 48 pounds of lamb carcass sold by the packer and 46.8 pounds of retail cuts of lamb which the retailer sold to the consumer.

Live lamb prices reached their peak in 1929. The highest monthly average price of 100 pounds of good grade live lamb that year at Chicago was reached in March and was \$16.68. The highest monthly average wholesale value of 48 pounds of good grade lamb carcass in New York was in April and amounted to \$14.62. While this was less than the value of 100 pounds of live lamb, the difference was obtained by the packer from the sale of the pelts and the various by-products secured from the live lamb. The retailer in New York obtained \$19.69 for the various cuts of lamb he sold out of the 48 pounds of carcass, making a gross margin of \$5.07.

In November 1931, the average price of good grade live lambs at Chicago was \$5.72 and the wholesale and retail values of the meat in New York were \$6.12 and \$11, respectively, while the retailer's margin was \$4.88. The drop in the value of 100 pounds of live lamb from the high point of 1929 was \$10.96 while the drop in the value of the meat obtained from that weight of lamb was \$8.50 at wholesale and \$8.70 at retail. It is apparent that the retailer lowered his selling price in line with the drop in the cost of the meat to him. The reduction taken by the packer on the wholesale value of the meat was less than the reduction taken by the producer on the live lamb. It must be kept in mind, however, that the packer also was

compelled to take a reduction in the returns from the sale of the pulled wool, skins, fats and casings obtained from the live lamb. The decline in the value of these products, amounting to about \$3 on the products from 100 pounds of live lamb, accounts for the difference between his reduction in the returns from the sale of the meat and the reduction taken by the producer on the sale of the live lamb.

The Outlook

The question now of interest to all of you is the immediate and long-time outlook for your industry. The 1931 lamb crop was estimated to be 2,320,000 head larger than the 1930 crop. The increase in federally inspected slaughter from the 1931 crop to the end of December amounted to 1,100,000 head. The number of lambs on feed on January 1, 1932, was 14 per cent larger than a year earlier. Supplies of lambs on

feed in Colorado were as large as last year. Utah, Idaho and California had fewer lambs on feed than last year. Of the other western states, including Texas, nearly all had more lambs on feed than last year. Texas has abundant supplies of feed, and weather conditions in that state in recent weeks have been very favorable for winter and spring grazing. California also has had excellent rains recently but needs warm weather to develop new feed.

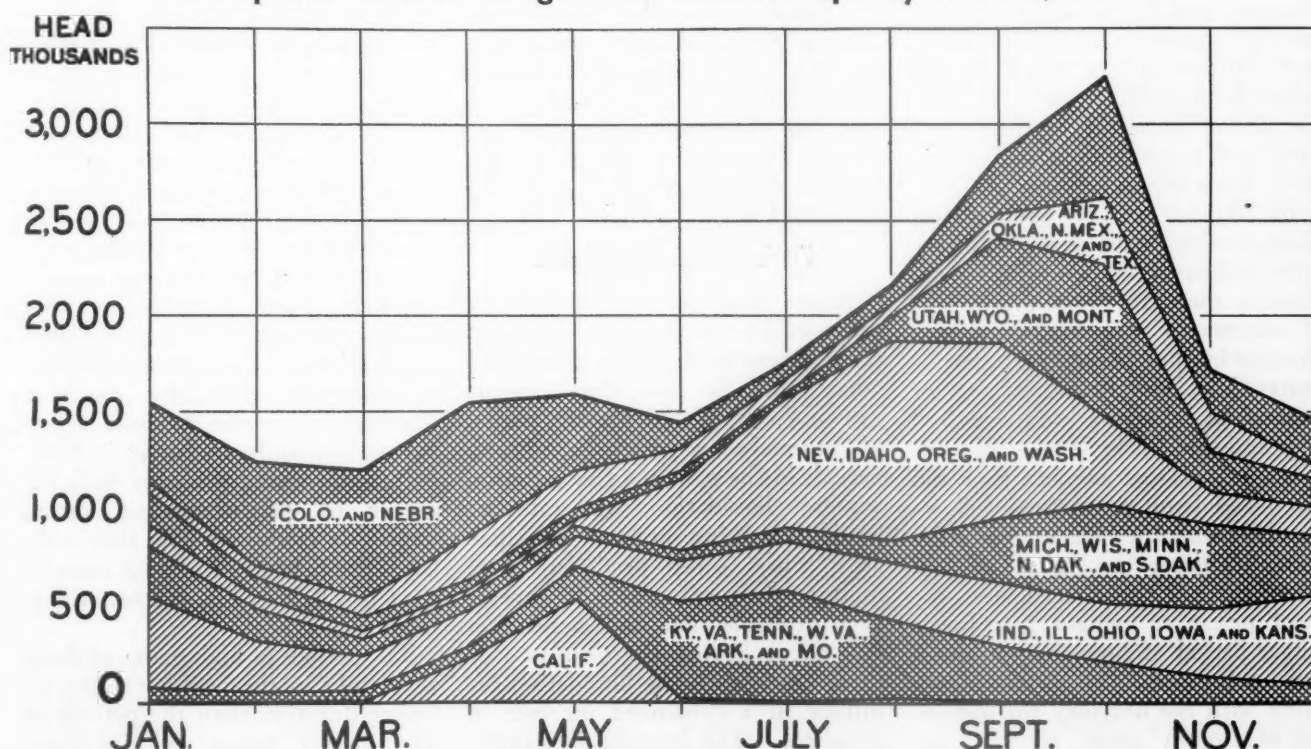
As to the prospects for the 1932 lamb crop, much will depend on weather conditions during the next few months. The low prices for aged ewes this past year prevented any reduction of this class of stock through slaughter channels but this winter may witness a considerable reduction as the result of death losses. The mild weather of last winter was one of the factors which accounted for the large increase in the 1931 lamb crop. It hardly seems

likely that we will have two mild winters in succession.

Permanent Changes Follow Depressions

When we consider the long-time outlook it is well to keep in mind that the sheep industry in the United States, as in many other countries, has been closely associated with the development of the frontier. The shepherd and his flocks preceded the tiller of the soil. As settlers moved westward and the country became more thickly populated, sheep were generally forced to the less accessible and more unproductive areas. It is of interest to note, however, that the most important shifts in the location of sheep production have occurred in every instance immediately following major depressions in sheep and wool prices. As proof of this statement we will go back almost 100 years to the first major business depression comparable to the one we

Sheep and Lambs: Origin of Market Receipts by Months, 1929



The marketing season for sheep and lambs varies for different states and according to production practices. Sheep comprise about 10 per cent of the total slaughter supplies of these animals. Texas leads in the marketing of aged sheep. Lambs are marketed as milk-fed lambs, grass lambs and grain-fed lambs. Milk-fed lambs are those marketed at three to four months of age which have been fattened on their mother's milk. Grass lambs are marketed largely from August to November. Those in best flesh condition are sold for slaughter while the others are sent to feed lots to be fattened on grain and other feeds.

are now experiencing—the panic of 1837 and the depression of the early "forties." Vermont was then the leading sheep state and was noted for its fine flocks of the Merino breed. The severe decline in wool prices at that time caused New England sheepmen to sell out, or move their flocks to Ohio and Michigan.

The demand for wool during the Civil War carried wool prices to record high levels and Ohio sheepmen for a brief period enjoyed undreamed of prosperity. The long depression of the "seventies" which followed the Civil War resulted in another westward migration of flocks—this time from the Eastern Corn Belt to the area west of the Mississippi River. Subsequent depressions, such as that occurring in the eighties, the panic of 1893, the uncertain economic conditions preceding the World War, and the depression of 1921—all resulted in important changes in the geographical distribution of sheep numbers,—especially in sheep kept primarily for wool. Montana and Wyoming flocks were greatly reduced from 1911 to 1917, and numbers in these states are still below the high records of 1909. California and Texas, on the other hand, have had a tremendous increase in sheep since the depression of 1921.

In addition to the geographical changes which have occurred in the sheep industry following major declines in sheep and wool prices, it is of interest to note that important changes in the character of the industry have also developed out of depressions. During both the Civil War and the World War, wool prices made a greater advance than did sheep and lamb prices, and following these wars they made greater declines. During the periods of low prices there is also a tendency for wool prices to remain low for a longer period of time than do sheep and lamb prices. These tendencies, along with the necessity for obtaining maximum gross returns per sheep in order for the industry to withstand the competition from other farm and range enterprises, apparently were responsible for the

initial stages of the shifts from wool to mutton production and from mutton to lamb production which occurred in the years following periods of low prices. The depression of 1840, for instance, caused sheepmen in the East to shift from the production of wool to mutton. The depression immediately following the Civil War gave the first major impetus to the development of dual purpose sheep by increasing the yield of mutton per sheep as well as improving the quality of mutton at the partial expense of the quantity and quality of wool produced. The period of low prices from 1883 to 1885 marked the beginning of sheep feeding in the Western Corn Belt. Grain feeding of aged sheep became an important industry shortly thereafter. The continued increases in the proportion of the mutton breeds in the sheep population, together with the need for further economies as a result of the depression of 1893, caused a shift from the feeding of aged sheep to the feeding of lambs. Lamb production for the slaughter market on a commercial scale had its beginning in the nineties and has been stimulated by the economic pressure resulting from each subsequent depression and period of low prices for sheep and wool.

Further Changes Probable

After studying the effects of previous depressions in the industry, the question immediately arises as to what will be the developments growing out of the present period of extremely low prices. In all such periods in the past, the first reaction has been liquidation, the rate of liquidation being greater in those areas where sheep producers were most severely affected. It appears very probable that such a reaction will occur during the next two or three years, with the liquidation resulting in a continued increase in slaughter. The increase in slaughter, however, is likely to be in lambs rather than in aged sheep, since present indications point to a level of prices for aged sheep which will

not be sufficient to cover marketing costs in many areas. During the period of low prices and liquidation from 1909 to 1914, when the industry was greatly expanded in the western states, such as it is at the present time, the reduction in the number of aged sheep came largely through heavy mortality on the farms and ranges as a result of lack of care, exposure, and old age. A similar liquidation of aged sheep during the next two years seems likely. In view of the fact that the marked decline in prices has affected the industry more severely in those areas where sheep are a major enterprise, (mainly in the western states) and since it is in these areas where winter weather and lack of care have the greatest effect on death losses, the liquidation is expected to be most rapid in that area. If this proves to be true, the decline in the production of fine wools will be greater than the decline in the production of the coarser wools.

There is no definite evidence as to what shifts, if any, will take place in the geographical location of sheep numbers, or in methods of sheep management by way of reducing operating costs or increasing efficiency in production during and following the next period of liquidation. If it becomes possible for producers in Texas to produce the necessary feeds and develop a mutton type sheep adaptable to that region, it is possible that spring lamb production in Texas might become an important enterprise. Such a development would seriously affect the spring lamb producers in California and would probably shift the center of production of spring lamb. It is also possible that early lamb production in certain areas of the Corn Belt will be further stimulated.

The periods of high prices of sheep and lambs in the past have been of longer duration than the periods of low prices; hence, within about three years the economic position of the sheep industry, from the supply standpoint, is likely to be materially improved.

The National Wool Marketer

THE articles appearing under this heading are prepared by, and printed for the National Wool Marketing Corporation. This Corporation represents 35,000 American wool growers united to establish cooperative wool marketing with the aid and direction of the Federal Farm Board. The Corporation is the only grower-owned and controlled agency operating in the eastern market.

Changes in Corporation Officials

THE executive committee of the National Wool Marketing Corporation opened its spring meeting at Boston, Mass., on April 18. Important changes in the duties of officials and in business arrangements were made to effect material economies in operation and to insure prompter returns and reports to member growers.

Members of the committee in attendance were as follows: President Sol Mayer, Executive Vice President L. W. Elliott, A. A. Johns, J. W. Hoech, J. H. Lemmon, and Frank Lebus. Vice President Roy Clary of Montana was unable to attend. Hon. C. B. Denman, member of the Federal Farm Board, met with the committee during some of its sessions.

In line with the policy of economy and for other reasons, it was voted to discontinue the position of executive vice president which has been filled since last December by Judge L. W. Elliott of Sonora, Texas. General Manager J. B. Wilson, who has been the chief executive officer of the Corporation during its two and one-half years of existence, now is to act as general field manager. His place in the Boston office will be taken by Col. Harry B. Embach. Col. Embach has for several years been the efficient secretary of the Arizona Wool Growers Association. He has also acted as one of the nonresident directors of the Federal Intermediate Credit Bank for District No. 11, which includes California, Nevada, Utah, and Arizona. Since March, Col. Embach has been in Washington where he was called to give assistance in the livestock division of the Reconstruction Finance Corporation.

The executive committee also voted to discontinue the salary which has heretofore been paid to the president of the Corporation.

Value of Cooperative Efforts

A LARGE number of "dealers," operating in a state producing 8 million pounds of wool, recently met in state convention to decide on what they should pay for wool this year. Being of the impression that the National would advance 10 cents per pound these "dealers" agreed to pay from 10 to 11 cents on direct purchase. Shortly thereafter they were informed that

the National's advance would be 8 cents, instead of 10 cents, whereupon they promptly voted to pay 2 cents less than previously arranged. The interesting point in this connection is, what would they pay, especially in years when the outlook for profits is uncertain, if the National were not in the field to provide competition?

Reports reaching Boston indicate that offers made on a pool in the West this week represented approximately 35 cents, clean, delivered Boston. This is wool for which a protective tariff of 34 cents per clean pound has been provided. It is not, therefore, reasonable to suppose that values could go any lower. That the next major movement will be upward is inevitable.

Handling the 1932 Clip

ONE of the aims of the National Wool Marketing Corporation is to furnish dependable information to the growers. If our recent letters have partaken of the pessimism now so rampant everywhere it may be charged to our determination to tell the truth as we see it. In this letter we are able to report at least one constructive achievement which should be of immediate help to the manufacturers as well as to the growers. On Saturday, April 30, 1932, the Corporation made the following announcement:

The National is prepared to handle the entire wool production of the United States for 1932. Ample funds, warehousing facilities and experienced personnel for financing and efficient handling have been provided. Acceptances by the growers of offers which ignore entirely present tariff protection, will, therefore, not be necessary.

The wool remaining from 1931 will be marketed to orderly mill demand as in the past, having in mind the protection of values. The National looks forward to the future, confident in the belief that the wool industry, through cooperative efforts, will work its way out of present difficulties.

This announcement followed conferences held in Boston between C. B. Denman, member, George H. Thomas, chief of the loan division, Federal Farm Board, and member of the executive committee of the National Wool Marketing Corporation, and financial institutions.

Immediate effect should be to restore confidence among producers and manufacturers of wool.

In times like the present it is not an easy task to secure sufficient funds to handle 400 million pounds of wool. But through the persistent efforts of the executive committee of the National and the whole-hearted cooperation of the Federal Farm Board the task has been accomplished. This is the National's answer to the whispering campaign carried on among the growers of the West and the manufacturers of the East for the purpose of discrediting the cooperative movement.

In order to speed up its returns to the growers the National has adopted a somewhat different policy for the 1932 season, which is briefly outlined as follows:

Wools will be appraised before being shipped, as was done last year, and an advance will be made on the shipping documents. As soon as the wool arrives in Boston a Board of Appraisers will examine 10 per cent of each clip to determine the various grades in each clip and the shrinkages. With this information the Board of Appraisers will compute the value of the various clips, using as a basis the average market price prevailing during the season. Hence each grower will benefit by the upturn of the market in proportion to the tonnage, condition and quality of his wool. All wools will continue to be sold on their merits as clips of better grades will receive higher valuations than clips of poorer grades. With this new method of making settlement it is expected that early in December of this year growers will receive additional advances on their 1932 wool and by the first of next June all accounts will be closed and complete settlements made to the growers. In this manner all wools will be sold truly cooperatively and all growers will share alike in the upturn of the market.

Another change which is contemplated by the National is that the charge of $2\frac{1}{4}$ cents per pound for selling wool in original bags and 2.65 cents per pound if graded, will cover storage and interest. The National is confident, however, that if it receives as large a volume of wool this year as it received last, these charges will be less than those quoted. These charges are less than any cooperative organization has ever operated on heretofore.

Under the new arrangements member growers also will be relieved from payment of interest on advances in cases where clips are held for later sale. The necessity is recognized for a uniform distribution of sales throughout the year in the interest of all consignors. The total amount of interest accruing upon advances on wools after arrival at Boston will be distributed over the entire receipts. This adjustment of interest charges together with the arrangement for paying average yearly prices for wools of the same grade and quality relieves the grower from being affected in any way by the length of time his wool is held before sale. These arrangements are eminently fair and necessary in the scheme of cooperative marketing and are in

compliance with the best business principles as well as with the financial interests of all the 35,000 growers who are determined to be represented in the making of prices in the American wool market.

Business Conditions and Prospects

AT the close of 1930 there seemed to be sound basis for the hope that the worst of the depression had been passed. Optimistic reports from high places gave buoyancy to this hope. Business activity gained steadily during the first four months of 1931, tending to create more cheerful sentiment and confidence in the stability of our institutions. Until the early summer of 1931 no serious credit crisis had developed. We had passed through a period of readjustments necessary to establish more equitable relations between conditions of supply and demand, and to this extent it appeared that progress had been made. During May, 1931, very serious financial difficulties in Central Europe put a stop to further progress and, for a time, threatened a complete breakdown in Germany.

The Fall of 1931

Sensing the necessity for immediate action, President Hoover, in June, issued his famous moratorium declaration, the good effects of which were instantaneous. It will be remembered that prices of wool advanced sharply in the producing sections at that time and outlook for a healthy fall wool market seemed bright. However, the selfishness and political stupidity shown by at least one European country minimized the good effects that would otherwise have followed the moratorium, and before long these effects were lost altogether. England in her magnificent struggle to maintain the gold standard sought and obtained accommodations in France and the United States, but found the burden too great and finally was forced to abandon the gold standard in September. Then followed a condition of uncertainty here and abroad which approached a state of panic. Gold was shipped out of this country at an alarming rate and withdrawals of funds from our banking institutions began. We all know what followed. Banks which had been considered impregnable closed in large numbers. Bonds and gilt-edged securities were dumped on the market at what they would bring. Terrific liquidation took place. Fear was the monarch, and buying, except for immediate needs, stopped. This is a condition out of which we are now trying to work our way. It has affected every individual and every kind of activity; no one has escaped the terrible consequences of the greatest economic depression the world has ever known. The length of time that may be required for recovery will depend upon the willingness of all the people to carry their full share of the burdens.

Under such conditions the decline in commodity values could not be prevented. Wool, though in a

favorable statistical position, had to suffer with the rest, and all who had confidently looked forward to a healthy fall and winter market were sadly disappointed.

Business on Dead Center

It is still impossible to report improvement in general business conditions. Good factors, such as increased automobile output, are offset by less favorable factors in other directions. Corporation statements for the first quarter of the year show earnings disappointingly low and turnovers the smallest on record. The passing of dividends continues; buying power is, consequently, being still further reduced. All of which is not conducive to betterment in the unemployment situation. The much stronger banking position might prove the forerunner of business improvement, even at this moment, if efforts to balance the federal budget through tax legislation, fair to all, were further advanced. Fear that this may be attempted along political lines, rather than along sound economic principles, is now the greatest obstacle to business improvement. Upon the solution of this perplexing problem will depend whether the crisis has been passed or darker hours are still ahead. In the meantime, commodity prices have registered no improvement in spite of all the efforts put forth by reconstruction finance organizations, and the conviction that heroic measures to right this situation must be resorted to, if existing debts are to be paid, is rapidly gaining ground. Inflation of some sort seems to offer the only solution, but how to bring it about without subsequent serious consequences is the puzzling problem. If the dollar is cheapened, commodity values should advance. Farm or ranch mortgages cannot be lifted while wheat, wool and livestock fail to yield cost of production.

For many years the American growers have, through careful breeding and culling, steadily improved their flocks. The result has been more wool and a greater percentage of lambs. While efforts in this direction should still be carried on so that the highest quality of wool that can be produced under our climatic conditions may be available to the manufacturer, thus lessening our dependence on foreign countries, further progress in this direction must of necessity be slow and gradual.

Lowering Costs

Hereafter the attention of the grower must also be directed to other matters of vital importance to his industry, especially if it should prove that we have entered upon an era of lower prices. Anyone who has attended wool grower conventions in recent years has had occasion to note the efforts made to ascertain actual costs of running sheep. To the writer three cost items have stood out prominently, unchanged or increased from year to year—taxes, freight rates and interest. While the last two items must be left to the

individual grower for personal demonstration, the first item can be lowered if the growers will act in unison.

Reducing Taxes

No matter in what manner taxes are assessed they must, in the final analysis, be paid by the producers of wealth. The following quotations from an address by Melvin A. Traylor, president of the First National Bank of Chicago, before a joint session of the General Assembly of Kentucky on March 4, 1932, illustrates the magnitude of the tax burden which has been placed on the shoulders of the public:

I wonder if it has ever occurred to you that, before the individual, the corporation, industry, commerce, or any of the other activities that make up the economic structure of this great country can earn one dollar for those interested, they must contribute approximately \$33,000,000 per day for each working day in the year for the support of the state and local governments, and approximately \$13,000,000 per day in addition for the support of the federal government. Translated another way and based upon the estimated total annual income of \$70,000,000,000 for the United States from all sources for 1930, approximately twenty cents out of each dollar, or \$14,000,000,000 of this total annual income, are required solely to carry on the machinery of our multiple governing bodies; and, further, this bill is approximately \$110 annually for every man, woman and child in the United States proper.

Compare this bill of \$14,000,000,000 with certain major items in our national income. It exceeds by \$2,000,000,000 the gross farm value of all agricultural production—crops and livestock—in the United States in 1929. It is only 7 per cent less than the total salaries and wages paid in 1929 to 10,117,800 officers and employees of over 210,000 manufacturing establishments in the United States.

What brought about this condition, and who is responsible? The condition exists, I think, in a large measure because we, the people, permitted it, and we, the people, are responsible; for, after all, government in this land of ours, whatever else we may say about it, is by and large the shadow of public will, and the tax burden of today is largely the result of public demand. We have called upon our governments for this service and that, for this luxury and the other—not counting the cost and ignoring our ability to pay, until now it is perfectly evident that during the joy-ride of the last decade our Pegasus of government has thrown a shoe and has gone exceedingly lame. * * * * *

As I stated, when we have completed our task, I believe that we shall discover that the question of taxation, aside from the question of revenue for the payment of existing debts, is primarily one of reducing future expenditures. This objective will not be accomplished unless there is a drastic change in the public attitude toward government responsibility. In other words, we cannot continue to demand of our governmental agencies that they perform for us the increasing number of things we have been requiring of them in the past—things we should do ourselves—and at the same time expect those responsible for government to reduce the cost of its administration.

It goes without saying that we cannot spend ourselves out of debt or improve our financial conditions by permitting our city, county, state or federal governments to do it for us.

The Wool Market

"HOW is the wool market?" is a question frequently asked these days, with shearing in full swing. The answer could be couched in two words—abnormally quiet. Indeed it requires a vivid imagination to say that a "market" exists at all. Seldom in the history of the trade has so little wool changed hands. One wool road-salesman told the story when he said it was no use for him to make another trip now, because all the mills in his district were closed. Luckily for him the fishing season is now open. Yet, the situation is not so pregnant with pessimism and gloom as one might expect to find it after more than three months of practically no business. The trade has become accustomed to conditions as they are and, knowing that things could not be any worse, is hopefully looking forward to a change of some kind which, it feels, must be for the better when it comes.

It is not necessary to seek other causes for this condition, as one explains all—absence of consumer buying. Demand for women's wear has, until recently, continued quite satisfactory, but with the approach of warmer weather naturally has diminished. Men's wear is not moving. The mills have had their openings for the next heavy-weight season, with prices lower and competition keen. Samples are now being shown to cutters-up and manufacturers, but these in turn are waiting to see what response may be expected from the retail trade. If this results in orders being placed we may reasonably expect renewal of some activity in the wool trade. Fortunately, a boom would not be required to lift the comparatively small amount still left of the 1931 clip.

Prices naturally have suffered during this long period of inactivity, but not to the extent that might have been expected. Efforts to lull the trade into an acquiescent mood in respect to lower prices have failed in most cases. When values have declined to a point where the tariff is ignored to the extent it now is, stocks of old wool on hand would seem to be fairly good property. Hence, the resistance being shown by the trade generally.

Mill activity is at this time at a very low ebb; some authorities estimate at 15 per cent of capacity. In this connection it is well to remember the low consumption of wool in 1930, when a decline of approximately 120 million pounds from a previous ten-year average was registered. Following the heels of this decline came 1931 with the largest consumption of wool since 1923; which showed the results that must inevitably follow any period of deferred consumer buying. Total consumption of wool for clothing purposes during 1931, estimated for the whole industry, rose from a ten-year average of 485 million pounds to 538 million pounds. Monthly consumption figures for 1931 reported, were as follows:

CONSUMPTION OF COMBING AND CLOTHING WOOLS REPORTED BY TEXTILE MILLS* BY MONTHS FROM JANUARY, 1931

(IN THOUSANDS OF POUNDS)			
1931	DOMESTIC	FOREIGN	TOTAL
January	18,640	4,217	22,857
February	20,759	3,249	24,008
March	22,041	4,353	26,394
April	26,851	4,184	31,035
May	26,797	3,537	30,334
June	29,300	2,732	32,032
July	35,634	3,200	38,834
August	34,289	2,799	37,088
September	33,010	2,458	35,468
October	27,904	4,440	32,344
November	23,709	2,127	25,836
December	20,812	2,175	22,987

* Approximately 25 per cent of the mills do not report consumption, but the tonnage of wool used by these mills has been fairly accurately estimated and included in the total of 538 million pounds.

These figures show that consumption reached its peak in July, 1931, after which it began to taper off until it reached its lowest point in December. Consumption for January, 1932, has been estimated at 24,251,000 pounds, of which 2,020,000 pounds was foreign; for February 24,025,000 pounds, of which 1,980,000 was foreign. It is not, therefore, unreasonable to expect somewhat larger consumption to follow present stagnant conditions, although the trend of general business has to be reckoned with.

WOOL will continue to dominate the fabrics field for 1932 with a great variety of new styles and fashion creations, the National Wool Marketing Corporation believes, following a survey of offerings for this year. But unless price cutting stops and purchasing power is restored, increased wool consumption may not be as noticeable as in 1931, even though wool holds the fashion spotlight.

Acceptance of wools as the leading fashionable fabric has come at an opportune time, however, when the almost complete inactivity of other fabrics is measured. Wool growers have been unfortunate in seeing the depression and falling prices for all commodities pull down values of their product at a time when it has been more popular than in two decades.

While little buying has been apparent during the early months of spring and pre-summer advance orders, wool has dominated the fabrics field and the thousands of new weaves and styles are highly popular, especially women's wear.

One of the new styles which should have bearing on the increased consumption of wool is the English drape suit for men. This model continues to take on added significance as a style and merchandising factor in the men's clothing field. The new style is a loose-

fitting, wrinkled shoulder model and has been generally accepted by Paris, New York and London. Its high-waisted, flat hip cuts give a rather loungy effect. Trousers are peg-topped and are worn with suspenders. New topcoats for fall will embody the drape effect.

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Oregon Weather and Crop Conditions

WITH a stormy March, and April that followed with but very little improvement there has been little to cheer the men with lambing bands on the range and not much more cheer for the men with bands that lambed early. While grass has come on in every section of the state it has been slow in all the higher elevations. Late April brought heavy snows to most of the higher range country. In the Hart Mountain district of Lake County snow fell to a depth of from four to eighteen inches.

While with oncoming grass the feed situation became less acute, yet it was still sufficiently bad so that several carloads of Red Cross wheat were badly needed by stockmen in several sections of the state. As the sheep began to move to the early range the price of hay went down. In Klamath County, where for a time it was thought there would be a hay shortage, the supply proved ample and the price dropped in March from \$15.00 to \$9.00.

The first new crop Oregon lambs were offered in Portland, March 9 and brought a high of \$10.00. Increasing supplies as spring advanced brought a reduced price and at the close of April good to choice spring lambs were bringing \$6.00 to \$6.50.

Much wool is coming off the backs of the sheep and into bags throughout the state as in most sections shearing is in full blast.

From drouth to floods has been the experience in Lake County in less than a year. In three days in March 1.27 inches of rain fell at Lakeview and then again in April in a single day nearly an inch fell. Goose Lake, which has been dry for two seasons, now has twenty miles of water in it to a depth of more than three feet. Lakes throughout Lake County which have been dry or on the verge of drying up now show signs of promise to be filled again this year. Sufficient moisture for good crops and grass is assured.

Sheep throughout the eastern

Oregon territory will be assessed at a substantially lower figure than last year, it was decided at a conference of county assessors held at Moro in March. In Baker County, for instance, the assessment of range ewes last year was \$4.00 per head and for other sheep \$3.00 per head. This year the range ewes from one to five years old will be assessed at \$2.50 and six and seven-year-old ewes at \$1.00. The policy decided upon was to assess sheep at prices ranging from \$1.00 to \$2.50 per

head, a reduction from last year's assessed value of \$2.00 to \$4.00 per head.

With continued cold weather in April when lots of range lambing was underway those who estimated Oregon's lamb crop at a low figure seem to be nearer right. In Union County, where lambing facilities are generally good, normal is considered a 100 per cent crop and present estimates, according to H. G. Avery, county agent, indicate an 80 per cent lamb crop. W. L. Teutsch.

Increased Lamb Consumption

FOR the first time since 1914 the per capita consumption of lamb in the United States has gone over the 7-pound point. In 1931, according to the estimates of the Bureau of Agricultural Economics of the U. S. Department of Agriculture, lamb was consumed at the rate 7.1 pounds per person, the high point since the 7.4 figure of 1914.

The 1931 figure represents an increase of 7.5 per cent over the previous year's consumption rate of 6.6 pounds. The government estimate placed the 1931 lamb crop at 8 per cent above that of 1930. The average rate of lamb consumption during the past 30-year period (1900 to 1929) is given as 6.2, which places the 1931 consumption 14½ per cent above that average, and 18.3 per cent above the 20-year average (1910-1929) of 6 pounds.

Admittedly, lamb went into consuming channels at greatly reduced prices. But it would be difficult to name commodities that went into

consuming channels at greatly increased prices. In comparison with other meats, lamb stands up extremely well. With an increased consumption of 7.5 per cent, retail prices of lamb (New York basis) declined 16 per cent from those of 1930. Beef consumption is estimated to have been 49.6 pounds per capita in 1931 compared with 50.1 pounds in 1930, a decrease of about 1 per cent, and retail prices of beef decreased 15 per cent. The rate of consumption for pork increased from 69.3 pounds per capita in 1930 to 69.6 pounds in 1931, or about .4 per cent, but retail prices declined 21 per cent.

The consumption of all classes of meat increased about half a pound in 1931 over that of the previous year. Last year the total consumption of meat per person is estimated to have been 133.2 pounds as against 132.8 pounds in 1930. The following table gives the rate of consumption during the past five years with the 20 and 30-year averages:

ESTIMATED PER CAPITA CONSUMPTION OF DRESSED MEATS AND LARD IN THE UNITED STATES, 1927-1931

	1927	1928	1929	1930	1931	20-Year Average 1910-1929	30-Year Average 1900-1929
Beef.....	58.4	51.7	51.4	50.1	49.6	60.2	64.3
Veal.....	7.4	6.8	6.8	6.8	6.9	6.8	6.3
Lamb and Mutton.....	5.4	5.6	5.8	6.6	7.1	6.0	6.2
Pork (ex. lard).....	68.5	73.9	72.8	69.3	69.6	63.7	63.1
TOTAL MEAT.....	139.7	138.0	136.8	132.8	133.2	136.8	139.9
Lard.....	13.8	14.7	14.3	13.8	14.4	13.1	12.7

Prosperity of Gold Inflation

THERE seems to be a wide-spread impression that we cannot have a return of prosperity without some artificial inflation of prices. One even hears considerable talk of free coinage of silver. This would give us inflation with a vengeance. At that, it would probably be better than the issuing of fiat money which was recently advocated by a professor in an eastern university. At least, the currency based on silver would have some intrinsic value.

It seems to me that a much more direct and easily controlled plan of inflation would be for Congress to raise the price of gold, say 50 per cent. This would certainly give us all the inflation necessary as it would automatically raise all prices to that extent. As the price of gold is fixed by an act of Congress, that act could be amended or a new one passed in a very few days' time.

While there are many corporation bonds outstanding, which are payable in gold, there are only a few such bonds that must be paid in gold at its value at the time of issue. Foreign exchange fluctuates from day to day, in any case; so that should not cause any inconvenience.

We needed a brake on the boom of '28 and '29 and nothing seemed to have the desired effect until the boom became top heavy and burst of its own pressure. A reduction in the price of gold at such a time would effectually act as a curb on speculation.

Conservative business might oppose such an act on the grounds that it would tend to destabilize our currency. However, conservative business, as well as our government, has fallen down pitifully in the present crisis.

International bankers would make the claim that this plan would reduce the foreign debts due this country. That is immaterial as there is no indication at present that even a small part of those debts will ever be paid. As a matter of fact, if we were a debtor nation today, instead

of a creditor nation, we would have a foreign market for our products and our financial difficulties would be largely solved.

The government has tried many weird experiments and has spent money like water to raise the prices of some commodities, especially

agricultural products. The enactment of this idea into law would raise the prices of all commodities without playing any favorites and without the aid and expense of unwieldy bureaus or new government machinery.

Sun River, Mont. E. R. McClure

The Durability and Scourability of Sheep Branding Paints

By JAMES HUMPHREYS, *University of Wyoming*

DURING the past few years, at the University of Wyoming, much work has been done on a project concerning the durability and scourability of sheep branding paints. This work was done, first, to determine the durability of various sheep branding paints; second, to determine the scouring quality of the various sheep branding paints; and third, to determine the effect of various temperatures of the scouring solution on the scouring quality of branding paints.

In June, 1930, five range ewes were used for each of the sixteen branding paints and branded on both sides of the backbone. The five ewes used to test each paint were selected at random, but a subsequent check by actual measurement showed that the ewes all had fleeces which graded fine.

The ewes were then put on the range and were under normal care and conditions of the typical western range. Five samples of each paint were taken at shearing time after the paint brands had been on the sheep for twelve months. Weston, American and Mintra were the most outstanding branding fluids as to durability and as to color and body texture.

The paints were graded for their

durability and scourability on the following basis: Durability: poor, 1; fair, 2; and good, 3. Using five ewes this made a total of 15 for a perfect score. Then letting 15 equal 100, the percentage of each was found. The same was done for the scourability of these samples: Insoluble 0; poor, 1; fair, 2; and good, 3.

After determining the durability of these paints at twelve months, samples of each were taken and run through a standard scouring solution (soda, 8 oz., soap, 12 oz., to 10 gallons of water at a temperature of 120 degrees Fahrenheit). Nine of the paints scoured out fairly well.

In the following table the average durability and scourability of these samples which were put through a standard scouring solution is given:

PAINTS	% Durability 12 Months	REMARKS	% Scour- ability
Kemp's Old Formula	47	Good color, good body	13
Kemp's New Formula	60	Good color, good body	93
Mintra	73	Body and color good, granu- lates slightly	8
Sherwin- Williams	60	A little gummy	50
Passaic	53	Color good; tends to granulate	100*
Devoe	47	Tends to stain wool	13
Peerless	40	Tends to granu- late	25
American	87	Good body; ex- cellent color	46

Weston	100*	Excellent body and color	0†
British Formula No. 13	7	No body, color fair	100*
British Formula No. 36-A	7	No body, color fair	93
British Formula No. 7	73	Good body and color	93
British Formula No. 19	0†	Powder like base, color good	100
British Formula No. 23	73	Good color and body	60
British Formula No. 2	33	Greasy color, good body	100*
British Formula No. 21-A	60	Color does not show on top	33

*High; †Low.

The first nine paints in the table are American commercial products and the others are paints recommended by the British Wool Industry Research Association.

Kemp's Old Formula, which is red in color, has a good body and the pigment stands out well.

Kemp's New Formula, which is somewhat similar, stands up a little better in durability, having a firmer body and a good color, and scours out very much better.

Mintra seems to have a considerable amount of filler in it as it granulates when scoured, which is a very peculiar feature only found in this paint.

Sherwin-Williams seems to have linseed oil as its base as it has a tendency to stain the wool and becomes gummy when scoured.

Passaic has a wool fat base but the paint is not firm in its body as are the other paints. Its best quality is its scourability.

Devoe is similar to Sherwin-Williams, and appears to have linseed oil as a base and it has the fault of staining the wool when scoured.

Peerless, which is blue in color, may have a little linseed oil for a base and has a large amount of filler as shown by its quick granulation on the wool.

American has a rather thin body, and good color as shown by its durability, but it is somewhat low in scourability.

Weston seems to have a linseed oil base and it has an excellent durability, but it does not scour out.

We do not have the formula for the American commercial paints but those for the British branding fluids are as follows:

British Formula No. 10 contains wool fat, lime blue, barytes, and oleum spirit. This paint has no body, is very poor in durability and excellent in scourability.

British Formula No. 36-A is made up of wool fat, resin, carnauba wax, kieselguhr, chromium oxide and oleum spirit. This paint also has poor body, poor durability, but excellent scourability.

British Formula No. 7 is made up of the following: Wool fat, resin, spirits of tar, and Spanish brown. This stains the tips slightly. It also has a good body and color and its durability and scourability are good.

British Formula No. 19 contains wool fat, resin, barytes, sudan III and oleum spirit. It has a powderlike base but good color. It is excellent in durability but does not scour out.

British Formula No. 23 contains wool fat, resin, oil of scarlet, flue dust, resin oil, and oleum spirit. This paint has fair durability and is fair in scourability although some traces of paint remain after scouring.

British Formula No. 2 is made up of wool fat, oleum spirit and Spanish brown. It is a greasy color, has a good body, rather low in durability but it scours out perfectly.

British Formula No. 21-A is made up of wool fat, resin, kaolin, resin oil, oleum spirit and vermillionette. The color does not show up on the top of the paint brand after 12 months' weathering. It is fair in durability but poor in scourability.

Later, other scouring tests were made in a solution with a change in the concentration of soda and soap and also varying the temperature of the solution.

The results of these tests show that the effect of the concentration of soda in making a paint soluble is very noticeable. With one concentration of soda the brand will be gummy and hard, and with a little more soda at the same temperature, and concentration of soap, the paint will dissolve immediately. This was particularly true with Peerless which, with the standard scouring solution, was insoluble even up to as high a temperature as 150 degrees Fahrenheit, but when the soda was increased to 16 and 18 points, per 1000 c.c. and to 24 parts, the paint dissolved immediately but at a lower temperature.

Ordinary scouring practice calls for a temperature of 115 degrees F. to 120 degrees F. At these temperatures some of the paints needed a heavy concentration of soda (16 to 24 parts per 1000 c.c.) in order to cut the paint.

As far as could be seen with the small staples of wool used in these tests, only slight soda burns showed up although the samples which were put in the high soda concentration solutions became somewhat harsh and not so workable for spinning as those scoured out in a lower concentration of soda. Other tests were made, keeping the temperature at 120 degrees F.

It was found that paints which were high in durability were low in scourability or, for example, Weston which was high in durability and poor in scourability, with as high a concentration of soda as 16 parts per 1000 c.c. did not scour out. Those paints which were not so high in durability scoured out much better.

Both tap water and distilled water were used. When using tap water the soda concentration could go as high as 16 parts per 1000 c.c. and not cause the wool to become harsh, while with distilled water the concentration had to be lowered to a concentration of 10 parts per 1000 c.c.

In all samples the tips did not seem to be burnt any more in a high concentration than in a low concentration of soda. At this same time four samples of mixed grease wool, grading from fine to three-eighths, were run through two scouring solutions. The first was our standard solution of six parts with nine parts of soap per 1000 c.c. using tap water. The second solution was ten parts soda, nine parts soap, per 1000 c.c., using distilled water. All four samples did not vary in the amount of soda burn on the tips and the two samples which were run through the second solution had a tendency to be a little softer to the touch.

In the raising of temperatures it has been found that it will help to scour out some paints but at the same time it causes the fibers to become harsh and weak.

Up to the present time we have not been able to find a branding fluid which will have excellent durability and at the same time scour out perfectly. We have found that those paints, which do scour out well, do not stand up as to durability, becoming illegible at the end of six or eight months.

If a branding paint with good durability and scourability could be found, even though the price were higher than the present day commercial paints, it would be profitable for the manufacturer to pay a premium and the difference of the extra cost of this kind of paint.

With the Women's Auxiliaries

OFFICERS OF THE LADIES AUXILIARY TO THE NATIONAL WOOL GROWERS ASSOCIATION

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Mrs. S. Grover Rich, Chairman, Legislative Committee, 1400 Yale Avenue, Salt Lake City, Utah.
Mrs. J. R. Eliason, Press Correspondent, 1606 South Fourth East, Salt Lake City, Utah.

All chapters are requested to send their reports of activities to the Press Correspondent.

Report of Cooking School at Idaho Falls

THE Post-Register, eastern Idaho daily, and Miss Marion Hepworth, were responsible for a three-day cooking school conducted in Idaho Falls, Idaho, March 29, 30, 31.

"Lamb is Always in Season, but Use the Fore-Half" had a prominent place in the program of work. A lamb patty grill, stuffed lamb chops, creamed lamb in toasted bread baskets, Saratoga chops, molded lamb loaf, and rolled breast of lamb, were all from the fore-half of lamb. Lamb pie with mashed potatoes piped around the biscuits, which formed the crust of the pie, these filled with peas, with a molded tomato salad, made a very attractive suggestion for an unusual cheap meal.

Menus were suggested for various cuts of lamb and suitable accompaniments, vegetables, salads, desserts, were all prepared and passed to the audience by a committee of the Women Wool Growers, who acted as hostesses on lamb day.

The Idaho Wool Growers and the Women Wool Growers sponsored the lamb days. The Women Wool Growers arranged with a local market for lamb to be furnished and also gave lamb cuts away for the prizes offered each day.

Women from nearby towns, as well as Idaho Falls, attended the school which was conducted in the Fox Theatre which was filled each day to capacity.

The cooking school was a new development in the "Eat Lamb" campaign and made possible the reaching of more women in this worth-while movement which the Women Wool Growers started in this district over a year ago. More work is under way and in April and early May, three demonstrations, at various points in Bingham County, to show new uses of lamb will be conducted by Miss Hepworth.

Meeting of Idaho Auxiliary

THE April meeting of Idaho Falls Ladies' Auxiliary was held on Wednesday afternoon at the Jack Edwards home on Ridge Avenue with Mrs. George Thompson assisting. A regular business meeting was held with the suggestion that each lady bring to next meeting patterns and materials to start making a patch work quilt for future benefits.

Household hints on economy in time and expense were exchanged among the guests present. Current events and community singing followed. Refreshments were served to 26 members present.

The next meeting is to be in one month with the idea of having a guest party in order to encourage organization and increase membership.

Mrs. Leon Contor.

Arizona Chapter Presents Lamb at Food Show

AT a food show sponsored by the Independent Grocers of Arizona, the Wool Growers Auxiliary had a booth and for a week demonstrated the use of lamb.

Menus and recipes were distributed to thousands of housewives visiting the show, and lunches featuring lamb-burger, lamb loaf, lamb pie, lamb stew, and lamb salad were served at noon and in the evening throughout the entire week. Lamb-burger and lamb loaf took the lead with the public, although information was desired from many about the preparation of the various dishes—the cuts, and prices, etc.

Those that took part during the week's activities feel that their time and efforts were well spent.

Mrs. Eugene Campbell,
Secretary of the Arizona
Wool Growers Auxiliary.

Utah Chapter Raises Fund at Bridge Luncheon

MRS. M. A. SMITH was hostess at a delightful bridge luncheon at her home on Twelfth East in Salt Lake City for the Women's Auxiliary of the Utah Wool Growers with the following committee assisting: Mrs. H. S. Erickson, general chairman; Mrs. J. H. Manderfield, Mrs. O. R. Ivory, Mrs. David Smith, Mrs. Stevens, and Mrs. J. R. Eliason.

There were 100 guests in attendance. The proceeds of the affair went into the treasury of the State Auxiliary.

The Lamb Supply

THE year 1931 will, in all probability, be marked in sheep industry annals as a peak in lamb production and consumption. The lamb crop, according to government figures, totaled 31,684,000 head, and from that total it is estimated 23,311,000 lambs went into consumption during the crop year, from May 1, 1931, to April 30, 1932.

This total slaughter represents an increase of about 10 per cent over that of the preceding crop year; it is 25 per cent over that of the 1929-30 period; 37 per cent above 1928-29, and 44 per cent over the 1927-28 period.

The figures involved in this comparison of lamb consumption during the past five years were arrived at by increasing the numbers coming under federal inspection each year by 25 per cent to cover the noninspected kill. While a fair method to use formerly, it is now indicated that the noninspected slaughter is increasing at a faster rate than that coming under federal inspection. In California, for instance, which is one of the major lamb consuming areas of the country, there must be a large proportion of home or local slaughter that does not come under federal inspection.

The size of the 1932 lamb crop is conjectural as yet. The complete government figures will not be issued until late in July. The government report on the early lamb crop, which consists of 22 per cent of the total lamb crop, showed a decrease of from 3 to 5 per cent. Statements coming in from all parts of the range country are to the effect that there is a material decline in the percentage of lambs saved in the later lambings. Esti-

NUMBER OF EWE LAMBS KEPT ANNUALLY FOR BREEDING USE
(UNITED STATES)

	Total Lamb Crop	SLAUGHTER			EWE LAMBS KEPT	
		Total*	Wether Lambs**	Ewe Lambs	Number	Per Cent of No. Docked
1927	23,764,000	16,136,000	11,288,000	4,848,000	7,034,000	59.2
1928	26,363,000	16,975,000	12,527,000	4,448,000	8,738,000	66.3
1929	26,441,000	18,690,000	12,500,000	6,130,000	7,090,009	53.5
1930	29,364,000	21,268,000	13,940,000	7,328,000	7,354,000	50.0
1931	31,684,000	23,311,000	15,050,000	8,261,000	7,581,000	48

(*) Federal Slaughter plus 25 per cent.

(**) One-half of total crop less 5 per cent to represent loss from docking to shipping time.

mates vary as to the number of ewes to be lambled this year, but considering the unusually heavy losses that have taken place in nearly every section of the range territory, together with the lower percentage of lamb yields, it seems conservative to forecast a 1932 crop of 85 per cent of last year's.

If from this reduced crop, the same percentage of lambs shall go to slaughter as from the 1931 crop, there would be a decline of 14 per cent in the number of lamb carcasses furnished the consuming public, which absorbed 74 per cent of all those born in 1931. In this connection, much would depend on the number of ewe lambs marketed by the sheepmen. Only about 48 per cent of the ewe lambs docked in 1931 is estimated to have been kept by the sheepmen for their flocks. Economic factors control this phase of the lamb supply. Should the turn in the road that we were supposed to have reached so many times during the past months actually become visible by next October, the maintenance at good ages of the ewe flocks that represent the collateral behind sheepmen's notes held by the banks and loan companies may appear to the officials of such banks and companies as a justifiable procedure. In that event, a larger proportion of ewe lambs will be retained and the lambs marketed decreased to that extent.

The number of ewe lambs held out for breeding purposes from the 1931 crop was 1,200,000 less than that in 1928. This makes certain that there will be a marked shortage in two-year-old ewes in the lambing bands in 1933. This, in combination with the heavy losses of older ewes during the past winter, makes practically certain a still further reduction in the 1933 crop below that of 1932.

A good deal has been said about the necessity for action on the part of the growers to curtail production as a means of improving prices. Apparently natural and financial factors have already accomplished this result. As to the desirability of such a course in any case, however, the remarks of Alden B. Swift of Swift and Co. before the National convention in January in Salt Lake are particularly interesting:

I was here in August, 1929, and if the same subject had come up as to numbers I would have said, "No. I would not advise decreasing the number." I think my judgment would have proven correct. But you have increased to such an extent—ten per cent a year in the last two years—and with eight million men unemployed, it would be impossible to move that volume except at very low prices. We have increased the per capita consumption and I am fearful that if you decrease your numbers to any great extent, it will be difficult to bring that consumptive power back. I believe the conditions will improve and that we will be able to handle the same number of lambs as in 1931 at better prices.

Montana Livestock Marketing Association Formed

MONTANA stockmen aligned themselves with the cooperative livestock marketing movement at a meeting at Helena on April 6. The meeting was called by the officials of the Montana Wool Growers Association and was attended by representative cattle and sheepmen of the state.

The new organization becomes a member association of the National Livestock Marketing Association, whose headquarters are in Chicago, and will be affiliated with the Intermountain Livestock Marketing Association at Denver and other organizations that are members of the National Livestock Marketing Association.

The officers chosen for the new Montana Livestock Marketing Association include: Fred Sheriff of Helena as president, J. H. Gilbert of Dillon and T. A. Ross of Chinook as vice presidents, and Max Leggett of the Montana Wool Growers Association as secretary. These men and Messrs. Guy Stambaugh and T. O. Larson make up the board of directors.

Membership in the association is based on the signing of the marketing agreement in use by all the cooperative livestock marketing associations and the payment of an annual fee of \$1.

The present plan of the Montana Co-op is to have field representatives out over the state to assist in all possible ways their membership to market their stock to the best advantage. They will keep the stockmen informed on market and feed-lot conditions and help them in choosing markets and shipping times to avoid congestion. Assistance will also be given to the placing of feeder stock. In this the association will have the advantage of connections with organizations in the large feeding sections that will furnish an outlet for the Montana feeders. Supervision is also to be given to stock fed on contract.

Around the Range Country

(Continued from page 15)

Grazing leases have been reduced one-fourth to a half. We think that the condition of grazing on the public domain has fallen off in recent years and believe that stockmen from other states should be kept out and more stress placed on moving camps within the allotted time.

A. A. Baker.

Grand Valley

Wool growers around here are rather reluctant to consign again to the National Wool Marketing Corporation on account of not getting returns for so long after shipping the wool. They're not inclined to consign to the old-line houses either; they would rather sell for cash outright. However no sales have been reported.

Ten cents and board is the rate prevailing for machine shearing; 8 cents and board for blade shearing.

In our estimation the public domain has not deteriorated in recent years and no change in its use is favored.

We are not through lambing yet, but it looks as if the yield will be about 90 per cent of last year's. The ewe bands were slightly larger than those of 1931, even after an approximate death loss of 10 per cent during the winter.

The weather is fine (April 20), but the spring range is only fair, with feed short and late.

Thad C. Bailey.

Walden

The weather was good during April. There is plenty of hay to feed the stock out and grass is just starting on the spring range.

All the sheep are fed during the winter. There was a 15 per cent loss in the old ewes and a 3 per cent one in the young ewes. Lambing has not started yet, but we have about 10 per cent more ewes to

lamb than in 1931 and probably will have a larger crop.

No wool sales have been made here yet. I think most of the men are favorable to consigning to the Corporation, depending on the size of the advances. I do not believe any wool will be consigned to the old line houses.

No machine shearing is done here, but blade shearing is being done at 10 cents per head with board.

The cost of leasing grazing lands has been reduced by 25 per cent.

We do not want any change in the present methods of handling the public domain lands.

Geo. L. Bailey.

New Mexico

Livestock from the early part of the month were in only fair to good shape, lacking range moisture and forage in many sections. It was too windy also for best vegetation development in places. A gradual improvement was noted, however, in livestock conditions, especially after the showery weather of the last ten days of April, though rains are still needed in most southern counties. A little feeding was still necessary in the northeast, where forage is very slow.

Querado

April has been cold and windy and the feed is growing slowly. Range conditions are good (April 23).

The winter loss in ewes is estimated at around 10 per cent. Lambing has not commenced yet, but we have about the same number of ewes to lamb as in 1931.

A good many of the wool growers are tied up with merchants and bankers who are against consigning their wool to the Cooperative.

Sheepmen here want the public domain turned over to the state for control.

Valentin Baca.

Arizona

It was much too dry for best range development until the last week, and then rains were not heavy nor as general as could be wished. Much warm weather earlier in the month accentuated the drouth,

but cold weather toward the close retarded range and forage growth. There is still a great deal of snow over the higher plateaus of the northern portion, where spring forage is not yet available in any important quantities. Livestock average in fair to good condition.

Western Texas

The prevailing temperatures were above the seasonal, and while precipitation has been frequent and fairly well distributed, more is needed to serve the best interests of ranchmen. Livestock and ranges are in fair to good shape as a general rule, ranges being somewhat uneven because of the inequalities in rain distribution.

Uvalde

Most of the sheep range country in Texas has had good rains in the past few days (April 28), which was greatly needed to help bring on the spring lambs, and also to stop the run of half fat and feeder lambs to market. The feed lot lambs are about cleaned up, but there are a good many going to market now that have been on grain fields (wheat and oats). A few breeders have bred black-faced rams to Rambouillet ewes in order to be able to ship out to market early, as they have a better getaway than the straight Rambouillots.

Winter losses in ewes are estimated at about 5 per cent. The number of lambs saved this year is about 70 per cent of what it was last.

From 15 to 20 per cent reductions have been made in grazing leases here.

W. C. Bryson.

Gatesville

This county (Coryell) is near the center of Texas, where there are no large ranches. Some men have as many as 800 to 1200 head of sheep, but most of them run small bunches of 75 to 100 head. A lot of small farmers have taken on small bands of sheep the last few years.

Grass is fairly good now (April 28). Very little feeding has been necessary during April. As all of the sheep are fed during the winter, we had few losses, around 2 to 4 per cent probably.

The results of lambing are about the same as they were a year ago.

W. R. Whitehead.

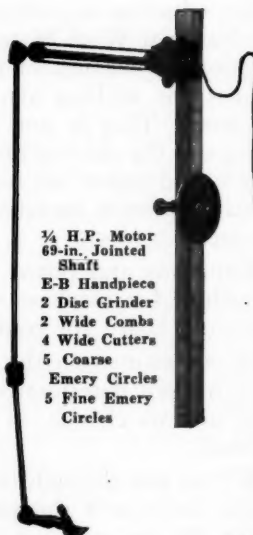
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The Lamb Markets In April

Chicago

A DECLINE of practically \$1.00 per hundred on fed lambs was the net result of operations at Chicago during April. Receipts for the month were 307,000, compared to 283,000 in March, and 368,000 in April of last year.

The four weeks' receipts at the seven principal markets were 1,254,000 which was 9,000 less than in March, and 130,000 less than in April of last year.

The federal inspected slaughter for the entire country during April was 1,496,707. In March it was 1,427,739, and in April of last year, 1,492,522.

The market opened on Monday, April 4, with a determined effort on the part of the buyers to reduce prices below the close of the previous Friday, in which they were successful. However, by Wednesday of that week, tops were reported as fifty cents higher. Some choice Colorado lambs were unsold at the close of the market, a shipper's bid of \$6.60 having been refused. Through the week there were several days on which practically nothing was done before two o'clock.

On Monday, April 11, the best wool lambs were still unsold at 2 p. m. However, there was a late small advance on very choice stuff, and the bulk moved up around a quarter. Buyers were apparently caught short as a price of \$7.75 was established late in the day. On Tuesday 21,000 head were on hand and the market was again deadlocked until late afternoon, packers securing some closely sorted lots at \$7.25. The week wound up with a net loss of about 25 cents on most kinds.

The third week brought the top quotation down to \$7.10, and that for the bulk from \$5.75 to \$6.75. This was attributed to conditions in the East. Local killers were not well supplied with finished lambs, which

prevented things from going worse than they did.

The week saw considerable arrivals of native spring lambs bring from \$8.00 to \$8.75, with some plain Texas springers at \$5.00. A small lot of fancy Colorado springers brought \$10.00, and 86-pound Californias moderately sorted were at \$8.25. The final week brought a further decline of 50 cents. Shippers were less active, and for the first time, clipped lambs were in better demand than wool lambs. The later receipts which represent the beginning of the clean-up from the feed lots brought a good many Colorados lacking finish, and in some cases with extra weight.

Greek Easter brought some strength to the spring lamb trade. Californias were at \$7.00 and \$7.25 with moderate sorts, the "outs" going at \$6.00. Best native springers were up to \$8.25 and a few fancy ones at \$9.00.

The last day of the month was another case of making prices in the late afternoon at a final quotation of \$6.85, and the bulk of fed stuff from \$5.50 to \$5.60.

The dressed trade was more satisfactory than that on live lambs. Carcasses were steady at Chicago until the last week of the month when they dropped from \$16.50 to \$14.00 for choice carcasses of all weights. At New York, best heavy carcasses started out at \$16.00, but held at \$18.00 for two weeks, closing the month at \$16.50.

Spring lamb carcasses at New York were quoted at \$23.00 at the end of the first week, and at \$20.00 later. There were no quotations on spring lamb carcasses at Chicago.

An effort to put up pork cuts almost succeeded. Light loins closed in March at \$10.50, were worked up to \$12.50 on April 8, to \$15.00 on the 15th, and then went back to \$11.00. At New York, the same class of loins started from \$10.50 and got as high as \$16.00 on April

15, but also closed the month at \$11.00.

Omaha

IN the face of the smallest April receipts at Omaha of sheep and lambs since 1928, all classes suffered a severe setback in prices last month.

Losses of 50@75 cents were general on fed woolled lambs, while clippers showed the minimum decline. Spring lambs were quotably \$1 or more lower.

Among bearish influences lately have been a severe break in eastern dressed lambs, the movement of southern and southwest sheep and lambs, along with Californias, and cheap beef and pork. Demand was limited most of time.

Not only did this combination result in both fed and spring lambs selling at levels \$2.50@3.00 under April, 1931, but tops were the lowest on record for that month since 1911.

The month opened with fed lambs selling at \$6.50@6.95. After a brief decline during which the top went to \$6.75, some recovery was made. By mid-month, the top was back to \$7.25 with the bulk selling at \$6.50@7.10, most good lambs \$6.75 up. From there on through the rest of the period the trend was sharply lower in another series of dull markets. The top at the close of April was \$6.10, bulk \$5.50@6.

Quality of woolled lambs deteriorated during the last two weeks, accounting for a mild portion of losses shown. As a result, buyers showed an increasing tendency to favor springers and old-crop shorn lambs.

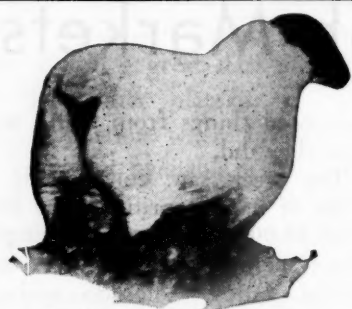
Late in the month California spring lambs made up a liberal proportion of supplies. While running considerably behind a year ago, the volume of California lambs moving east so far this season is still in excess of normal. Quality of lambs which the coast state has supplied so far has been better than last season on the average. Lately, however,



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Elm Park, Guelph, Ontario, Canada

more unfinished Californias have appeared.

Sales of Californias were made during the first two weeks of April at \$7.75@8.25. On the break, top dropped to \$6.85 with most good kinds selling at \$6.50@6.75 as the month ended. Unfinished lambs sold down to \$6.25 with second cuts at \$6.00 and outs on down to \$5.50.

Shearing lambs and feeders followed the decline in fats and closed \$1.00@1.25 off. Shearing stock was in brisk local demand through mid-month. As a result, shipments of feeders from Omaha were only 3,500 behind a year ago during the four weeks. A total of 34,700 went out, or half again as many as in March.

Most shearing lambs sold at \$6.00 @6.50 prior to the break. Top at the high time reached \$6.65. On the close good lambs had to sell at \$5.00 @5.25 and light lambs went under the \$5.00, with further price recessions scored since then.

So far the available supply of new crop California feeders has been light. As usual at this season, local feed lot owners are absorbing the entire supply. First sales in this class were made at \$6.50 but the market dropped to \$5.50 on closing rounds.

Quite a few thin shorn Texas aged lambs appeared on the market last month, selling from \$5.50 on down to \$4.25 late. Some light Texas springers moved to feeders at \$4.50@6.10, according to the time of month when sold.

The bottom fell out of the old ewe market with the movement of southern sheep. Late in April prices approached the lowest levels in history, first reached last summer, and some ewes were not bringing enough to pay freight and marketing costs. Net losses for the month amounted to \$1.75@2.00 and buyers didn't really want any aged stock even at such drastic reductions.

From \$4.00, top woolled ewes dropped to \$2.00 with a good kind at \$1.50. Shorn ewes that brought \$3.00@3.25 early in April were sell-

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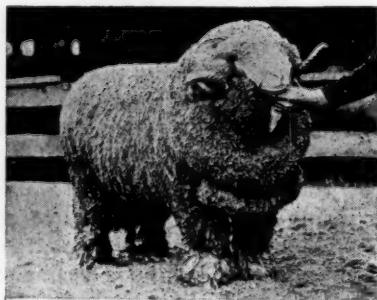
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ing at \$1.50@1.75 on the close. Medium ewes and those bordering on culls dropped under \$1.00 and some common canners sold as low as 20 cents per head. Yearlings have been nominal for the most part. So too, have bred ewes, for which there is little or no inquiry.

K. H. Kittoe.

Kansas City

APRIL closed with winter fed lambs at 85 cents under the March closing level; spring lambs broke \$1.50; shorn lambs \$1, and mature fat mutton sheep \$1 to \$1.50. On the basis of the net decline quoted it would seem that the market during the month was very unsatisfactory. However, a good part of the time prices were above March levels and not until in the last ten days of the month did it start on a downward course.

At the beginning of April best lambs brought \$6.85. A two-day decline brought quotations down to \$6.25 but an upturn started on April 6 that was not checked until tops reached \$7.40 where it held from April 13 to 18. From then on there was a gradual recession that left best lambs selling on the close at \$6.

After the middle of April quality and condition of offerings took a material drop and the \$6 price on the close was on medium quality kinds that were not of prime finish. The quality part of the winter's feeding had been cleared prior to the beginning of the fourth week of the month. Shorn lambs sold as high as \$6.85 and then closed at \$5.60 down. In relation to the total number on feed this winter a comparatively small per cent was shorn before marketing. Low prices for wool accounted for this. Shearing was done only where fleeces had begun to break and get stringy. Weather conditions, no very high temperatures, were favorable for carrying fed lambs in fleece.

Around 50,000 Arizona spring lambs arrived during the month. In the first half of the period they

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sold at \$8 to \$8.50 and then took a gradual decline that brought the close down to \$7. The pre-Easter supply of Arizonas sold at \$9 to \$9.50, so that the net decline for the marketing period thus far is \$2 to \$2.50 a hundred pounds. Arizona is about through shipping early lambs for the season.

Few native spring lambs have put in an appearance. Cold weather in March and early April delayed their developments and it will be late May or June before the movement takes on normal proportions. Southern and southeastern lambs are beginning to move eastward and the run will be heavy in May. Scattered shipments arrived from Texas, but dry weather the past few weeks prevented lambs from taking on their usual good condition.

Fat sheep found a ready outlet the first half of the month but in the past ten days they broke to the low point of the season. At the best time fat ewes sold up to \$4.40; yearlings \$5.85 and wethers \$5. They were in full fleece. On the close yearlings brought \$4, wethers \$2.50 and ewes \$1.75 to \$2.25. However, those that sold earlier had been winter fed while the late arrivals were but little better than grass fat.

Winter fed lambs, shorn or in fleece, are about all marketed. The remainder will filter through to markets in the next three weeks. Spring lambs will take precedent in the market. Arizona lambs this year came mostly in 80 to 94 pound weights. There have been few years on record that Arizona was able to produce so much weight prior to May. Winter fed lambs were also heavy. Many weighed above 100 pounds, and few below 90 pounds. No discrimination was made against weight and this season will be one of the few on record that heavy lambs have sold on an equal footing with light and medium weights.

One of the outstanding features of the month's market was the united effort of the selling side to

hold prices up. This was equally as true at one market as at another. Some days sellers did not make a deal until after 2 p. m. and they put the buying side in a position where they had to pay the price. Had not sellers countered the bearish tactics of buyers with every means at their command the market would have been much lower than it was. Buyers knew that they could not make their own market because sellers raked and scraped up every bit of demand there was to be had. In no previous month have commission men and stockyards companies at central markets spent more money on wires in getting orders for lambs than they did in April.

Lamb prices would have been considerably higher during the month had it not been for the record low prices for hogs. On April 28 no hogs sold above \$3.40, the lowest top price reported since December 1898, and only in 1886 were they lower. The weight of this cheap pork tended to cut down demand for other meats that were higher in price and consequently dressed lamb suffered accordingly.

Killers had counted on a large supply of grass fat mutton sheep from Texas in May and June. They were available at that time last year and early in the season it looked as if they would be plentiful again this year. However, heavy frosts in Texas in March, followed by dry weather since then resulted in poor range, and Texas will do well to have half as many grass fat muttons as last year.

Kansas City April receipts were 213,938, compared with 311,788 in the same month last year. A heavy movement of grass fat sheep in April last year made receipts a year ago the largest on record. In the first four months this year receipts were 766,399 compared with 878,200 in the first quarter last year.

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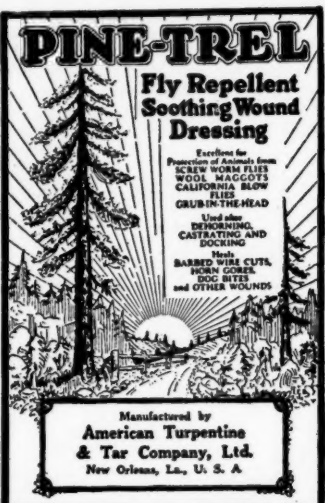
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Denver

FED lambs at the close of the month of April were around 65 to 75 cents lower than at the opening. Receipts were liberal, totaling 289,579 head compared to 189,434 head during April, 1931.

The Denver sheep market maintained during April the position taken in March as the second largest sheep market in the world. Chicago was the only market having a larger supply than Denver during the month.

Good fat lambs were selling early in April around \$6.75. Prices advanced early in the month to \$7.40, but by the close had dropped and best lambs were selling here from \$6 to \$6.10 on the closing session. However, during the last week of the month good lambs brought \$6.25 to \$6.35.

Of the 289,372 sheep and lambs received, there were sold and weighed here 254,765, most of the balance consisting of through shipments to feed lots or ranges. Local demand was good and there was also a strong demand during the month for shipment to eastern points and to many intermediate districts. During April 400 carloads of lambs were purchased here for shipment to New York, 68 to Brooklyn, 13 to North Bergen, N. J., 49 to Hoboken, 21 to Boston, 17 to Philadelphia and 27 to Cincinnati. Many shipments were also made to points between Denver and Cincinnati and between St. Paul and St. Louis.

Around 40,000 California spring lambs were received at Denver in April, since the season started about the middle of the month. Good spring lambs were selling around \$6.50 to \$6.85 at the close of the month, although during the closing week they sold up to \$7.10 and earlier in the month as high as \$7.50 to \$7.85.

Around 100,000 lambs remained in northern Colorado feed lots at the close of April, according to government statistics. These are

now being marketed rapidly and are expected to find a fairly good demand if they are properly distributed from day to day.

W. N. Fulton.

St. Joseph

SHEEP receipts for April were approximately 163,800 compared with 142,978 last month and 187,685 in April a year ago. Colorado feed lots furnished about half of the month's supply, Nebraska about 26,500, Texas and New Mexico around 20,000 and California 19,500.

The month's market was uneven from day to day, the top on fed lambs ranging from \$6.00 to \$7.30. The latter price was paid on the 14th, with the closing top at \$6.00. After the middle of the month prices lost \$1.25, with lambs weighing above 100 pounds at \$5.75@5.90 at the close. Clipped Texas and New Mexico lambs sold on the close at \$5.50.

California spring lambs were arriving daily the last two weeks and prices on these show the same decline as fed lambs. Early in the month they sold largely \$7.75@8.00, with the top at \$8.15, but on the close it was mostly a \$6.75 market, with the extreme top at \$6.85. Quality was generally good, many shipments sold straight, while some had to take 5 and 10 per cent sorts, with a few 15@20 per cent out. Near the close of the month a few feeders went out at \$4.75@5.00 and shearing lambs sold earlier up to \$6.00.

Though the supply of aged sheep was not heavy, prices declined sharply during the month. During the first two weeks fat ewes sold \$3.00@3.50, but on the close such kinds were selling \$2.00@2.50 with best clips at \$2.00. Colorado yearlings sold up to \$6.25 during the month, but on the close quotations ranged around \$5.00, with wethers \$3.00@4.00.

H. H. MADDEN

Important Western Browse Plants

U. S. Department of Agriculture, Miscellaneous Publication No. 101, by William A. Dayton, Plant Ecologist, Branch of Research, Forest Service.

Price 45 cents, Superintendent of Documents, Washington, D. C.

OVER fifty families of western browse plants and their important species are discussed in this bulletin of 213 pages. No attempt is made to present detailed botanical descriptions. A general description, sufficient with the illustrations to promote recognition of the plant, is accompanied in each instance with a discussion of its climatic requirements and value. The aim of the bulletin is announced as that of presenting the economic value of these plants in relation to the proper management of range and livestock where they are the principal vegetation.

In addition to the plants that are particularly valuable as forage for livestock, there are also included those that are important on account of "their abundance, poisonous properties, or some other specific reason."

Preceding the consideration of the individual plants, the author defines the term "browse" and discusses the importance of plants so designated. On this latter point, the bulletin says:

While not, of course, of forage value equal to the grasses, browse is of enormous importance to the livestock industry under western range conditions, and especially in times of drought and other occasions of feed shortage. Roughly speaking, of the browse species so far collected on national-forest ranges, only about 1 in 18, or 5.5 per cent, possesses very considerable forage value, but the number that are grazed to some extent, at least under certain circumstances, is very great. Only about 30 species or 3.15 per cent, appear to have been poisonous to livestock, but a number of others may possibly be so. In addition to their value as browse for livestock, shrubs on the range frequently have other values, such as utility for watershed protection and wild-life conservation, poisonous or medicinal properties, cordwood, edible fruits or nuts, latex, and as indicators or "ear marks" of overgrazed range, planting sites, and potential agricultural land.

This publication is the result of 22 years of collection and study by

members of the Forest Service, and the manner in which the information is presented should make it a very valuable piece of literature for all stockmen. Common as well as scientific names of the plants are given and the excellent index makes reference to any plant an easy matter.

A copy of this publication can be had by sending 45 cents to the Superintendent of Documents at Washington, D. C.

Statement of the Ownership, Management, Circulation, Etc., Required by the Act of Congress of August 24, 1912

Of THE NATIONAL WOOL GROWER published monthly at Salt Lake City, Utah, for April 1, 1932.

STATE OF UTAH
COUNTY OF } ss.
SALT LAKE

Before me, a Notary Public in and for the State and county aforesaid, personally appeared F. R. Marshall, who, having been duly sworn according to law, deposes and says that he is the editor of the National Wool Grower, and that the following is, to the best of his knowledge and belief, a true statement of the ownership, management, etc., of the aforesaid publication for the date shown in the above caption, required by the Act of August 24, 1912, embodied in section 411, Postal Laws and Regulations, to-wit:

That the names and addresses of the publisher, editor, managing editor, and business manager are:

Publisher, National Wool Growers Assn. Co., Salt Lake City Utah;

Editor, F. R. Marshall, 509 McCornick Bldg., Salt Lake City, Utah.

Managing Editor—none.

Business Manager, F. R. Marshall, 509 McCornick Bldg., Salt Lake City, Utah.

That the owner is: National Wool Growers Association, an unincorporated body of Salt Lake City, Utah (F. J. Hagenbarth, president, and F. R. Marshall, secretary), and thirteen state wool growers' associations, all unincorporated.

That the known bondholders, mortgagees, and other security holders owning or holding 1 per cent or more of total amount of bonds, mortgages, or other securities are: None.

F. R. MARSHALL, Editor

Sworn to and subscribed before me this 30th day of March 1932.

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